ePayroll

User Guide

Full User Guide for School Administrators & Approvers

Corporate Operations

Version 2.1

July 2015

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Welcome to ePayroll

Introduction

This document is designed to be an all inclusive guide that jointly provides:

- an overview of how the ePayroll process works
- complete step by step instructions for each transaction type
- specific directions and rules for the more complex cases
- hints & tips for simplifying data entry
- links to Payroll contact email addresses
- links to other documents available on the Schools' InfoLink web site
- suitable and relevant material for both experienced and inexperienced school payroll administrators alike
- sufficiently detailed for infrequent users based at schools with low volumes of transactions

This guide replaces both the **School Administrator & School Approver User Guide (Version 1.0 September 2011)** and the **ePayroll Essential Guidelines for School Administrators (Version 2.0 October 2011)** documents. These have now been withdrawn from use and are no longer available on InfoLink. Any electronic or hard copies you have of those guides should now be deleted or removed from circulation.

Updating these guidelines

We are committed to ensuring that these guidelines remain useful, relevant and appropriate. In conjunction with advice from schools based colleagues on our established Schools' Customer Working Group we will provide updates as found necessary.

We also welcome suggestions for improvements from all our users based on your practical working experience of using ePayroll.

Essential reading

As with any system or item of equipment, the accompanying documentation is often either discarded or otherwise put aside until another day. Whilst we understand and acknowledge the reasons why you are unlikely to read this guide from cover to cover we would recommend that you do at least take time out to familiarise yourself with the General Concepts and Worklist Management sections to ensure that there are no misunderstandings.

How to use these guidelines

A set of guidelines are provided for each transaction type.

As far as possible we have made each section self-contained and that avoids constantly referring you back and forth to other sections of the document. In this way, and whilst the document is primarily designed for soft-copy reference, you could print hard-copies for specific transaction types rather than the entire document.

To minimise the size of the document we have however included a single reference section called **Hints & Tips for New Appointments and Assignment Changes** rather than repeating those details in each of those sections.

In need of further advice

In the event that this guide does not address your query or leaves you unsure as to what action you need to make you should contact payrolls **Corporate Service Centre**.

Email: schools.servicecentre@essex.gov.uk

Telephone: 033301 35859

Post: Payroll, E1 County Hall, Market Road
Chelmsford, Essex CM1 1QH

General Concepts & Features

Real time links with Payroll

ePayroll is a web based application that sits over the top of the core Oracle Payroll System, providing an intuitive interface for remote administrators that does not rely on them having any detailed payroll system knowledge.

Links are real-time, providing remote users with direct access to the up to date payroll information relating to their employees.

ePayroll can be accessed from any PC or similar device and is not restricted to just schools' based equipment.

Form based transactions

A separate form is provided for each transaction type (starter, leaver, bank change etc) with each being accessed via a simple intuitive menu.

Most of the forms can be jointly used to interrogate the data that is currently held as well as for editing or updating the data. In this way, editing details can be completed very quickly as you invariably only need to enter the items that require changing without having to re-supply those items that remain unaltered.

User types and responsibilities

3 individual user types are available to school users.

User Type	Responsibility
Administrator	Access to all forms. Ability to read all information held and to submit updates.
Approver 1	Ability to approve all transactions submitted by an Administrator with the exception of any transaction that relates to the Approver.
Approver 2	Transactions relating to an employee who is also an ePayroll Approver 1 are automatically directed to an Approver 2

Users can have mixed responsibilities allowing them to be an Administrator as well as one of the two Approver types.

Users do not require any detailed Payroll system experience or knowledge of PAYE regulations but are likely to have basic internet browser skills and a good understanding of Local Government Green Book and Teacher conditions of service.

Separation of duties process

ePayroll is primarily designed to help schools enforce a strict separation of duties and we recommend that this option is adopted wherever possible.

Mindful of the way many schools prefer to operate ePayroll provides a flexible approach that enables the formal approval or ”sign-off” activity to lie outside of the system. This allows the Administrator who proposed the transaction to also make the approval. This method has been agreed with and approved by ECC’s Internal Audit team.

Control of the adopted method rests entirely at the discretion of each school. New users can be added and responsibility levels for existing users modified as desired – full details on how are included in this guide under the heading ePayroll User Management.

Printable page feature

Whilst a full audit trail of approved changes is maintained within the Oracle payroll system, our recommendation is that you always use this feature in further support of your own audit trail. This is particularly relevant if you are a user with joint Administrator and Approver responsibilities where Auditors will undoubtedly be seeking evidence of physical signatures in lieu of the electronic audit trail.

Clicking the Printable Page button will open a new window on your PC. From the File drop-down menu in this window simply select the **Print...** option to direct it to your local printer. You could also use the **Save As…** option to save an electronic copy if you wish.

Approvals process

Most transactions are subject to a two stage submission and approval process. Once approved, transactions are normally stored straight away on the payroll database and the changes made will similarly be reflected on ePayroll.

In a small number of cases, Payroll will need to supplement the entries you have submitted before payroll is finally updated and this will result in a short delay before the change is finally reflected on ePayroll. These will typically be for end assignment transactions and for assignment changes where the date effective of the change is prior to the last change made (known as an Insert). In all such cases, the system will provide an appropriate message advising you that the transaction has been routed through to Payroll for their action.

Employee Name Search

With the exception of the New Hire and Additional Assignments, the selection of all other menu items then provides you with a means to search and select the employee you wish to view and/or update.

From the list of names displayed you then simply click the appropriate Action icon to continue.

Please note that the name search field only requires the employee's last name (surname). Other combinations will not provide the expected results. e.g. a search entry of John Smith will not return the desired results.

The search field is not case sensitive. e.g. entries of Smith, SMITH, smith or SMith all work equally well.

TIP: you do not need to enter the full last name. e.g. a search entry of "s" will return all employees whose last name begins with an S and a search entry of "sm" would return a slightly modified set of records. This method may not be entirely suitable for Central Payment schools as the records that the system displays will include all central payment school Supply Teachers. You can however get around this by sorting the records displayed on the Organisation (school name) column.

Viewing data (read-only)

ePayroll is primarily designed as a means to submit and approve updated information to payroll. As ePayroll does not provide read-only versions of each input form, if you only want to view currently held information you will often need to follow the prompts shown on the screen as if you were intending to make changes but then use the 'cancel' option instead of submitting it for approval.

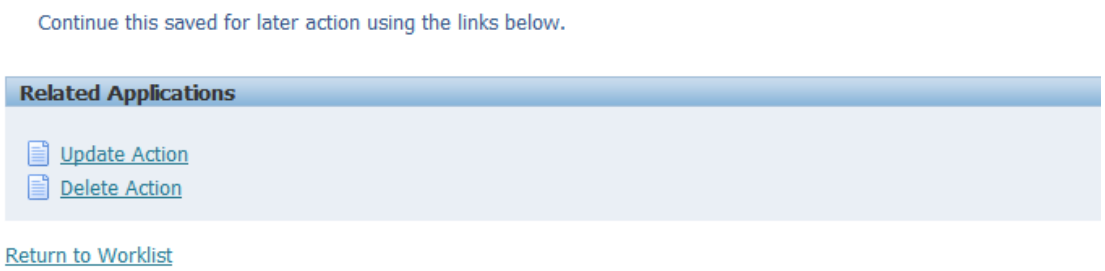
Save for later feature

The vast majority of transactions that you'll prepare and submit can be completed very quickly; with experience, a simple change of hours can be performed in a single minute.

Despite the ease of completion provided by ePayroll, most transaction types offer a 'Save for Later' option which you can use to should you find that you are unable to complete the transaction in a single visit. In practice, this will probably be limited to new appointments where the volume of data that needs to be entered is obviously greater as is the time needed to complete the transaction.

After selecting 'Save for Later' the system will provide a confirmation message and the item will appear in your Worklist as an item that needs to be completed.

When you are ready to do so you can select the item from your Worklist. The system will then ask you to confirm whether you want to continue with the saved transaction (Update) or abandon it (Delete).



You are then normally directed back to the screen where you previously left off but you may sometimes first be asked to confirm the effective date of the transaction.

Payroll deadlines

All entries impacting a payroll run must be submitted and approved before the payroll deadline. Please therefore enter and submit information as soon as possible as this will allow the approver time to check and approve your entry.

Payroll deadlines are published on the Essex Schools InfoLink.

Logging on and getting started

Login to ePayroll

- Your user name is your nominated email address.
- Your initial password will be emailed to your nominated email account.
- When you log in to ePayroll for the first time you will be asked to reset your password. You should immediately report any issues to the Corporate Service Centre.
- Your password should be at least 8 characters long and should contain letters and numbers. The system does not allow adjacent duplicate characters e.g. password1 does not comply due to the double ‘s’.
- **TIP:** use the Forgotten Password? link if you have forgotten your password. A new password link will be sent within a few minutes to your nominated email address. For security reasons, this link only remains usable for 4 hours. If this time limit is exceeded you will need to re-use the login assistance feature and start again.
- You will be required to change your password every 90 days.

Worklist & Approvals Management

Introduction

The principal purpose of the Worklist is to provide a trail of:

- confirmation of items sent for approval
- requests for items to approve
- confirmation of items that have been approved

The Worklist is primarily designed for users with a single responsibility. i.e. either an Administrator or an Approver. With this set-up, the items that appear on the Administrators Worklist will either be confirmation of the transactions that you've sent for approval or confirmation of items that have been approved. For Approvers, the Worklist will only ever show transactions that you have been asked to approve.

For good reasons, many schools will adopt a set-up where users have joint Administrator and Approver (normally Approver1) responsibilities. In these cases, the Worklist will display all 3 message types which might initially appear confusing to an inexperienced ePayroll user.

Each transaction created by an Administrator that requires an approval will appear on the Worklist for each relevant approver for your school. "Relevant" will normally mean each user at your school with Approver 1 responsibility. The exception to this is where the transaction relates to an employee who has ePayroll Approver 1 responsibility and, in these cases, the approval request will automatically be sent to your school's Approver 2 users.

Where a school has more than 1 Approver 1 then the approval request will appear on each of those user's Worklist. The approval can be made by any Approver 1 on a first-come first-served basis and will be cleared from the Worklist of all other Approver 1 users automatically. (These same principles equally apply to transactions requiring Approver 2 action).

How to approve a transaction

Approval requests will be displayed in your Worklist on the home page of ePayroll. The wording will vary according to the transaction type (starter, leaver, bank change etc) that an approval is being sought for but they will always display the name of the user who submitted the transaction.

The example shown below is for a user who has joint Administrator and Approver 1 responsibility. If you only have Approver responsibility then the entry sent from SYSADMIN would not be shown.

1. Click on the subject item that you've been asked to approve.
2. Check the detail that is now shown on the review page display.
3. Click Approve

You will then be returned to the home page. The approval request line has been removed from your Worklist and (if you are the Administrator) the entry from SYSADMIN has changed to indicate that the request has been approved.

How to reject an approval request

1. Click on the subject item that you've been asked to approve.
2. Check the detail that is now shown on the review page display.
3. Click Reject

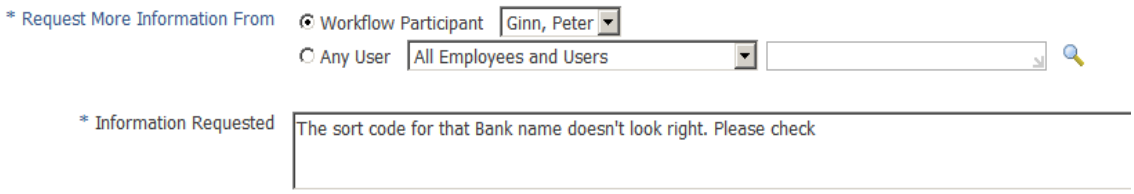
You will then be returned to the home page. The approval request line has been removed from your Worklist and (if you are the Administrator) you will now have an extra line from SYSADMIN advising you that the request has been rejected.

How to request more information before making an approval

This feature is only suitable for schools operating a strict separation of duties where the joint Administrator & Approver 1 responsibility is not being used.

1. Click on the subject item that you've been asked to approve.
2. Click Request Information

3. Enter the details that you want confirmed in the Information Requested box.


* Request More Information From
Workflow Participant
Ginn, Peter
Any User
All Employees and Users
* Information Requested
The sort code for that Bank name doesn't look right. Please check

4. Click

You will then be returned to the home page where the approval request line has been removed from your Worklist

A new entry will appear on the Administrator's Worklist with the narrative **More Information Requested:** The Administrator can then click on that Worklist item and send a response back but they cannot edit the details. The Administrator's options therefore are then:

a) to provide the details requested by the Approver and ask that the approval now be made OR

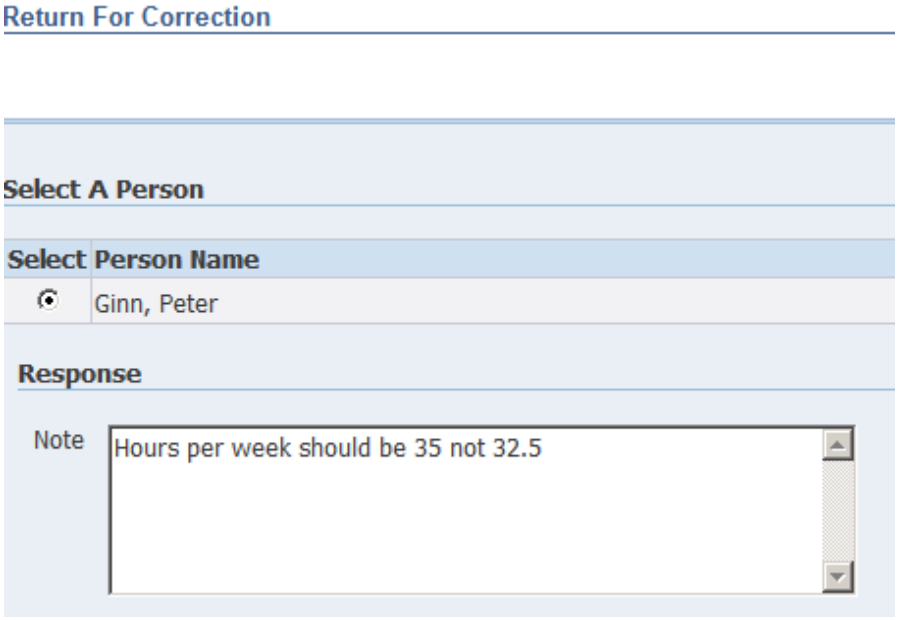
b) to ask that the Approver rejects the approval request.

How to return an approval request for correction

This feature is only suitable for schools operating a strict separation of duties where the joint Administrator & Approver 1 responsibility is not being used.

1. Click on the subject item that you've been asked top approve.
2. Scroll down to the bottom of the review page now shown and click on the

link.
3. Select the user that you want to return the item back to (there will normally only be one to choose from) and enter the details that require alteration.



4. Click Submit

The following confirmation message will now be shown:

5. Click OK

You will then be returned to the home page where the approval request line has been removed from your Worklist

A new entry will appear on the Administrator's Worklist containing the narrative **Returned For Correction**. After selecting the item from their Worklist the review page is shown from where the Administrator's options are either:

a) to scroll down to the bottom of the page and click Continue Action This will allow the Administrator to make appropriate amendments and to resubmit the transaction

OR

b) click Delete to cancel the transaction.

How to maintain your worklist

It is a good idea to keep your Worklist up to date and clear of items that you have already dealt with. This will particularly be the case for users with joint Administrator and Approver responsibility but is a good practice for all user types.

Our recommendation is that you clear your Worklist of items on the following basis:

User type	**Method**
Administrator Only	Leave each transaction that you've created on your Worklist until you receive confirmation from the Approver that they have accepted your proposed change.
Approver Only	When you approve a change request the item is automatically removed from your Worklist so no additional action is necessary.
Joint Admin & Approver	Clear all notifications relating to a given transaction shortly after you've approved it. After it's been approved you will normally find that the only Worklist item left to be cleared is the final approval confirmation message.

Removing an item from your Worklist is achieved by selecting the item from the Worklist and then clicking the

link. The system will not let you close a notification where you still have an outstanding action to perform so there is no risk of accidentally removing an incomplete transaction.

Items that have been closed or "archived" can be viewed by selecting the **Full List** button at the top right-hand corner of the Worklist.

Retrieving a "missing" approval request

ePayroll's transaction and approval process relies on each school having all 3 user responsibility types covered at all times. Occasionally, because of illness or termination a school may find that an item has been sent to an Approver group (Approver 1 or Approver 2) which no user is currently authorised to access.

After you have made the necessary alterations to your school's user accounts (see section titled ePayroll User Management for details) you should contact the Corporate Service Centre and to ask them to retrieve the missing items and to redirect them as you require.

Hints & Tips for New Appointments and Assignment Changes

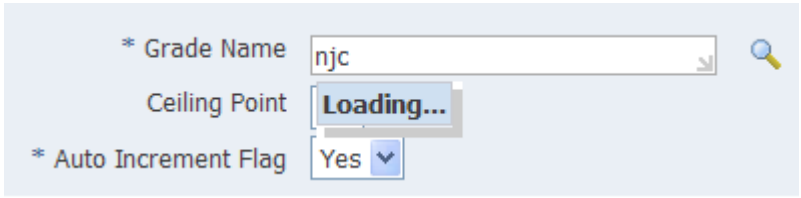
Introduction

The New Hire, Additional Assignment and Assignment Change forms all share a virtually identical input form controlling key payroll data items that directly impact on employees pay. The aims of this section of the guide are to:

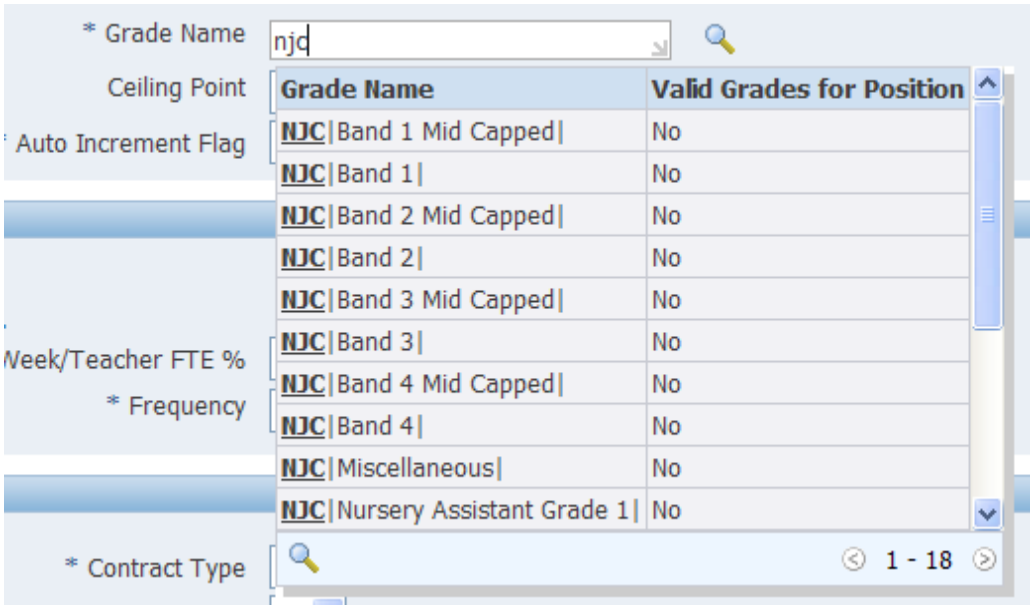
- provide specific instructions for key fields
- give hints & tips for simplifying and speeding up data entry
- provide completion guidance for less common employee types like Foreign Language Assistants

Type Ahead Search Feature

TIP: to change **Grade Name** or **Position** where the magnifying glass option is otherwise available, remove the current contents of the field and then type the first 3 characters of the new value. The system will then briefly show that it is loading items:



before going on to display those that you can then choose from:



This method does rely on a degree of system knowledge but with experience is a trick that saves time and is a lot less clunky than launching a new window with the icon.

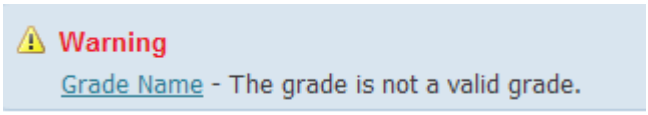
For **Grade** most of your employees will either be Support staff where the grade always starts with **NJC** or Teaching staff where the grade always starts with **TEA**

For **Position** there are a total of 24 items that can be obtained simply by typing the first 3 characters from the following list:

Assistant Headteacher	Gardener Grounds Staff	Nursery Nurse
Caretaker	Headteacher	School Assistant
Catering Staff	Higher Level Teaching	Senior Midday Assistant
Cleaner	Instructor	Supply Teacher
Clerk To School Governor	Learning Support Assistant	Teacher
Deputy Headteacher	Librarian	Teaching Assistant
Exam Invigilator	Maintenance Staff	Technician
Foreign Language Assistant	Midday Assistant	Visiting Music Teacher

Invalid Grade Warning Message

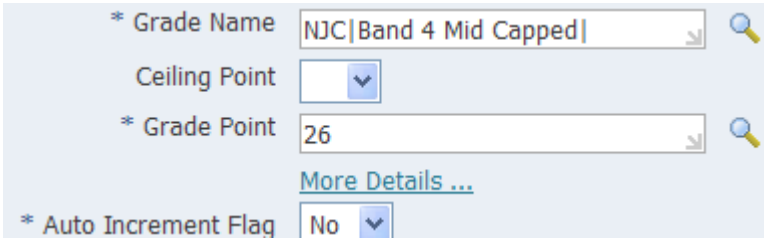
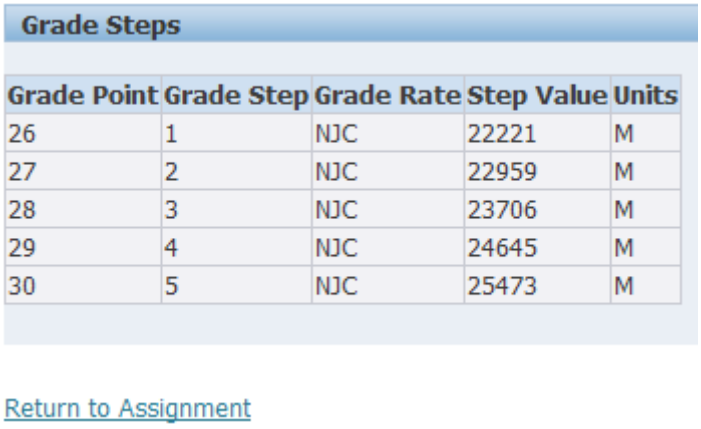
TIP: After entering or amending a **Grade** the system may display the following warning message:



This warning can always be ignored. After adding or updating the employee's **Grade Point** the warning message will go away.

Data Entry Guidance

Field	Essential Guidance
Position	As shown above there are 24 generic position titles are available to select from. For Central Payment schools this automatically controls the employee's cost code. See also the Type Ahead Search tip that helps make data entry easier.
Organisation Name	In most cases the default value of your school name will be what's required and won't need to be amended. **Central Payment** schools also have the option of selecting **Supply** where the employee is in the Supply Teaching pool of employees. **Central Payment** schools also have the option of selecting **Transfer** which can be used as a temporary staging area where an employee is transferring between 2 Central Payment schools. This

Field	Essential Guidance
	process is fully described in this guide in the section titled Transfers Between 2 Central Payment Schools.
Grade	The choice of Grade directly alters the Grade Point and Ceiling Point values that you can then select from. See also the Type Ahead Search tip that helps make data entry easier.
Ceiling Point	You can optionally specify a maximum grade point for the employee that varies to the standard maximum for their Grade. Left blank, the ceiling will automatically assumed as being the standard maximum for the grade.
Grade Point	This is the Grade Point that the employee is currently on. **TIP:** By clicking the More Details ... link you can view the FTE salary scales for the current grade:  After viewing the details click Return to Assignment to return to the employee's record 
Auto Increment Flag	Provides you with direct control as to whether the employee should receive an increment at the next incremental date.
Hours Per Week / Teacher FTE %	The system interprets entries in this field as Hours Per Week for Support Staff and as an FTE % for Teachers. Entries for each are in decimal format and can be specified to 3 decimal places. Local Government Green Book Conditions is set up to operate on the basis that a full time working week is 37 hours. If you enter a value greater than 37 then they will receive more than the full-time

Field	Essential Guidance
	equivalent pay. e.g. 38 hours will pay 38/37ths of the annual salary for their salary point. If you have an employee who you need to set up for more than 37 hours per week you should contact the Corporate Service Centre for advice.
Frequency	The input screen shows an essential tip which must be observed. For **Teachers** the value must always be **Year**; for **Support Staff** the value must always be **Week**. These values default automatically according to the type of employee and are unlikely to require alteration.
Contract Type	This field primarily determines the absence scheme rules that should be applied to the employee.
Pay Location	This field determines where the employee's pay advice will be sent. You must normally select **W** for **W**orkplace. For Supply Teachers in Central Payment schools you should select **H** for Home Address but this should not be selected for any other employees.
Pension Scheme	Please refer to the **Pension Scheme Rules** described in the **Assignment Change** section of this guide.
Weeks per year	Applies to Support Staff only. Where left blank the system will calculate pay based on 52.14 weeks. As the tip on the input screen explains, this field must include the annual leave element. Note also that a full year is 52.14 weeks and not 52.0 Entries greater than 52.14 will result in incorrect payments being made.
Salary Basis	For most employees the entry will be "Salary Spinal". i.e. their salary is automatically calculated based on the grade point that you've supplied. "Salary Annual" should only be selected where you wish to pay at an off-scale or schools-own rate. In these cases, also refer to the Allowances & Deductions section and follow those instructions on how to add, edit or delete a Salary Annual element.

Foreign Language Assistants, Instructors and Schools Own Rate employees

Field	Instructors*	Foreign Language Assistants	Schools Own Rates
Position	Instructor	Foreign Language Assistant	As appropriate
Grade	As appropriate	Teachers|Foreign Language Assistants OR Teachers|Foreign Language Assistants +Fringe	Teachers|Misc or NJC|Misc as appropriate
Grade Point	As appropriate	163 (non Fringe) or 164 (Fringe)	n/a
Hours	0 (zero)	Standard: 12 Chinese: 18	As appropriate
Frequency	Year (Teachers) Week (Support)	Week	Year (Teachers) Week (Support)
Contract Type	Teachers (Teacher) LGPS (Support)	Foreign Language Assistants	As appropriate
Pension Scheme	Teachers (Teacher) LGPS (Support)	LGPS	As appropriate
Salary Basis	Salary Spinal	Salary Spinal	Salary Annual
Other	See notes below.	none	Add a “Salary Annual” allowance on the allowance screen. The £p value you enter must be the full-time annual equivalent and NOT the actual amount you wish to pay.

*** Instructors:** the key issue here is determining whether the employee is a Teacher or Support Staff, with the Frequency, Contract Type and Pension scheme values determined accordingly. If you are unsure which to apply then you should contact the Schools HR Advice & Support team for advice.

Absences

Introduction

The Absences menu item can be used to:

- Create a new sickness absence record.
- Manage an existing sickness absence record e.g. close an existing sickness absence record upon the employee's return to work.
- Search and view historical sickness absence records.

Absence management within the Oracle payroll system is an exceptionally powerful feature that fully automates all the entitlement calculations and payment adjustments according to a variety of contractual and statutory scheme rules based on the employee's contract type (Teacher, LG Green Book etc). The complexity of these built-in rules imposes some necessary limitations on the functionality that we can provide to you, the end-user. These are included in the following **Important Notes** section and are therefore essential reading.

As an aid to your management of absences, details of any open (ongoing) absences will be emailed to you on or shortly before each payday as a reminder. Nil returns (no records to report) are not currently provided.

Payroll will also provide details, in the form of an emailed letter, where an employee's full pay or half pay entitlement is about to expire.

Important Notes

- Where an employee has more than 1 assignment, absence data is shared between each of those assignments and only needs to be entered once. This equally applies where an employee works for 2 or more separate Central Payment schools and you may find that the absence has already been entered by the other school.
- Absences for any given employee must be entered AND approved in ascending start date order. Exceptionally, if you need to add a new absence period that begins earlier than the most recently recorded absence then you will need to submit details to the Corporate Service Centre using the retained function communication template form. A copy of this form along with additional guidance material can be found on the Essex Schools InfoLink.
- A closed sickness absence record cannot be amended through ePayroll. If you need to make changes to a closed absence you will need to submit details to Payroll using the retained

function communication template form. A copy of this form along with additional guidance material can be found on the Essex Schools InfoLink.

- Absence transactions will be sent to a school approver for approval. The payroll system is not updated until approval has been given.

- An open absence (end date not currently held) cannot be edited until the originating transaction to create the absence has been approved.

- It is essential that absence records are closed when the employee returns to work. The impact of not doing so and how quickly that happens will, of course, be dependent on the employee's length of service and previous absences but, at some point, the system will otherwise reduce salary to half pay or nil pay as appropriate.

- Absences reported via ePayroll are limited to sickness absence and accident at work absences. Unpaid leave should be reported on the additional hours spreadsheet monthly return.

- Gradual Return to Work (GRTW) cases are not included within ePayroll. When the employee goes onto a GRTW programme, initially leave the long-term absence record open (leave the end date empty) and submit form SR2 to Payroll. On receipt of the SR2 Payroll will review the long-term absence and close it for you. Form SR2 can be found and downloaded from the Essex Schools InfoLink.

Data Entry & Approval Techniques

The frequency at which absence records are updated in ePayroll will vary from to school to school, largely dependent upon volume and the resources available to manage the process. Another leading factor will be whether the administrator responsible for creating the absence entries is also the approver or whether the school has instilled a strict separation of duties.

All schools need to be mindful of the payroll deadline dates. These are published on the Essex Schools InfoLink on the Submission Deadlines page. As with all published deadlines we would ask, as much as you can of course, to work with those deadlines and not to them, making last minute entries the exception rather than the norm.

There are no right and wrong approaches but the following notes should help you decide which method is best for you:

Monthly updating

Probably best suited to schools with low volume absences.

First, check whether you had any open absences carried forward from the previous month. Where the employee has since returned to work, update these by entering an end date and then approve each of those updates.

Before you start entering new absences, check whether any employee has 2 or more separate absence periods to enter and deal with those employees first. i.e. to make sure that they are entered in ascending date order. Approve the first absence period before creating the second absence period – this makes finding the first absence on your Worklist and approving it a lot easier.

Move onto the remaining employees. As each will only have one absence they can be added in any order you wish. After completing the data entry, select each one in turn off your Worklist to approve them.

Finally, open in turn each Absence related item on your Worklist sent from SYSADMIN and close the notifications using the Close Notification button.

Daily/Weekly update

This method helps keep your absence records bang up to date and minimises the likelihood of having to enter a large volume of data on or around each month's deadline date.

The principles are exactly the same as described for monthly updating above but you are likely to experience a higher volume of approval activity, especially if you update on a daily basis. This will arise because you are more likely to be creating open ended (unclosed) absences to begin with and then closing them at a later date. As each transaction requires separate approvals, a higher percentage of absences will require 2 approvals rather than 1.

How to add a new absence record

1. Select Absences from the main menu

2. Search for the employee using the standard search technique fully described on page 9

3. From the list of names displayed click the appropriate "Action" icon.

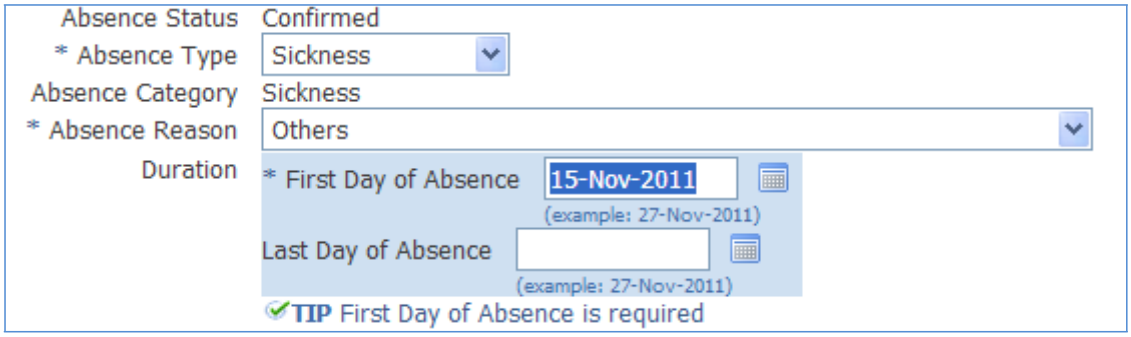
Note: from this point you can select the Cancel button at any time to abandon the edit.

4. Click Create Absence

5. In the **Absence Type** field use the drop down menu to select Sickness (or, exceptionally, Accident at Work).

6. In the **Absence Reason** field use the drop down menu to select the best fit reason for absence. If none are close enough then select "Others".

7. Use one of the calendar controls or type in the **First Day of Absence**



8. If you already know the last day of absence then complete this now else leave it blank.

9. In the **Planned Absence** field use the drop down menu to identify (Yes or No) planned leave. e.g. prior notice of an out-patient appointment, surgery etc.

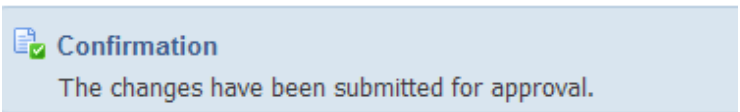
10. Click Next

11. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 6.

12. Optionally (not recommended) - click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

13. Click the Submit button.

14. The screen will now refresh and show the employee's updated absence record including the record you have just created. A message at the top left hand corner of the screen will display:



15. To continue entering or updating absences for another employee scroll down to the bottom left hand corner of the screen and click

Return to People in Hierarchy

This allows you to start from step 2 rather than going back all the way back to the main menu (step 1).

Approvals

For each absence you have created an item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an absence transaction and that it has been sent for manager approval.

For each absence you have created an item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to close or delete an open absence

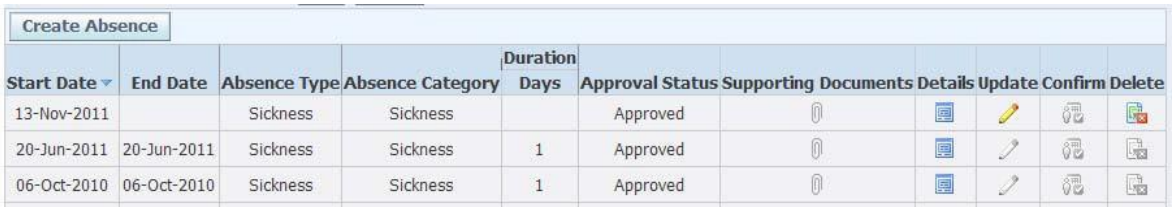
1. Select Absences from the main menu

2. Search for the employee using the standard search technique fully described on page 9

3. From the list of names displayed click the appropriate ”Action” icon.

Note: from this point you can select the Cancel button at any time to abandon the edit.

As an employee can only ever have 1 open absence at a time it will always be displayed on the first history display line and will be the only record that can be edited.



4. Click the Update icon or the Delete icon as appropriate.

5. For deletions go straight to step 7.

6. Use one of the calendar controls else type in the **Last Day of Absence**

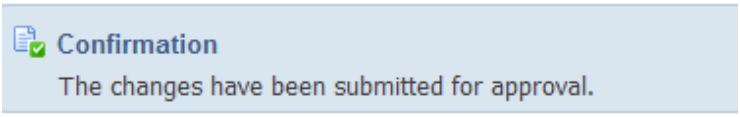
7. Click Next

8. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 5.

9. Optionally (not recommended) - click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

10. Click the Submit button.

11. The screen will now refresh and show the employee's updated absence record including the record you have just created. A message at the top left hand corner of the screen will display:



12. To continue entering or updating absences for another employee scroll down to the bottom left hand corner of the screen and click

Return to People in Hierarchy

This allows you to start from step 2 rather than going back all the way back to the main menu (step 1).

Approvals

For each absence you have created or updated an item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an absence transaction and that it has been sent for manager approval.

For each absence you have created or updated an item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to delete an incorrect absence record

Administrators can only delete unclosed absences and only those that have been approved.

Approvers can effectively delete an unclosed absence by rejecting the approval request. This can be achieved by selecting the approval request from the Worklist and then clicking the

button.

To delete a closed absence you will need to submit details to the Corporate Service Centre using the retained function communication template form. A copy of this form along with additional guidance material can be found on the Essex Schools InfoLink.

Allowances & Deductions

Introduction

In payroll, allowances and deductions are known as elements. The Allowances and Deductions menu item can be used to:

- view the details of an existing element
- add a new element
- edit an existing element
- delete an existing element

Outer Fringe, Inner Fringe and Teacher Learning Responsibility are among the more commonly used allowances and, whilst most people would not describe Basic Pay as an allowance as such, the payment of 1/12th of an employee's basic annual salary each month is also controlled by the presence of an element. This will normally be an element called Salary Spinal and is automatically created by the system when you add new employees during the new hire process.

ePayroll allows you to determine when and if these elements are applicable (active) by specifying effective dates for when they start and, optionally, when they change or cease. An employee can have as many separate elements as necessary with each one being independent of the others.

Important Notes

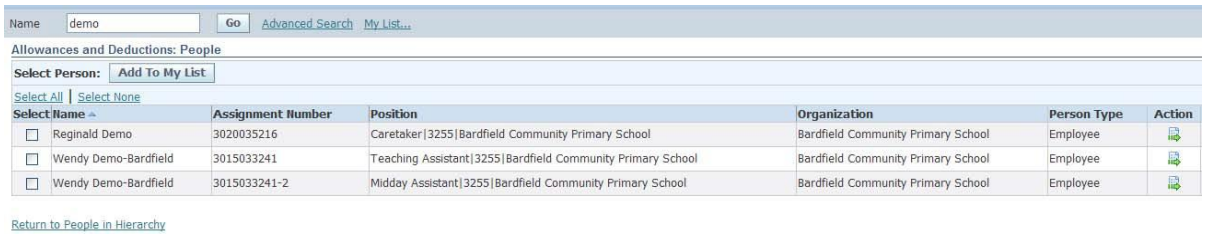
- Not all elements used by payroll are included in the list-box for you to pick from but are limited to the most frequently used. If you need to add or amend an element that is not available for you pick from then you should submit details to the Corporate Service Centre using the retained function communication template form. A copy of this form along with additional guidance material can be found on the Essex Schools InfoLink.

- As described in more detail later on, some allowances require you to supply a £p value. Where this is required you should pay particular attention to the prompt provided which will indicate whether you need to enter the full time equivalent (FTE) or actual amount to pay and whether the value should be the annual or monthly amount. The prompts are very precise and very clear but **incorrect payments will result if you enter a value on the wrong basis**.

How to add a new allowance or deduction

1. Select Allowances and Deductions from the main menu.

2. Search for the employee using the standard search technique fully described on page 9



   Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.

4. Click the Add New Allowances/Deductions button.

5. Select a **Type** from the list box now shown. This will normally be **Allowance – Recurring**.

6. The screen will then refresh and display an **Option** list-box. Select the option (choose the element) that you require.

The screen will then refresh and display a Details section. The contents of this section are variable according to the element that you selected at step 6. There are 3 commonly used variations, examples of which are shown below.

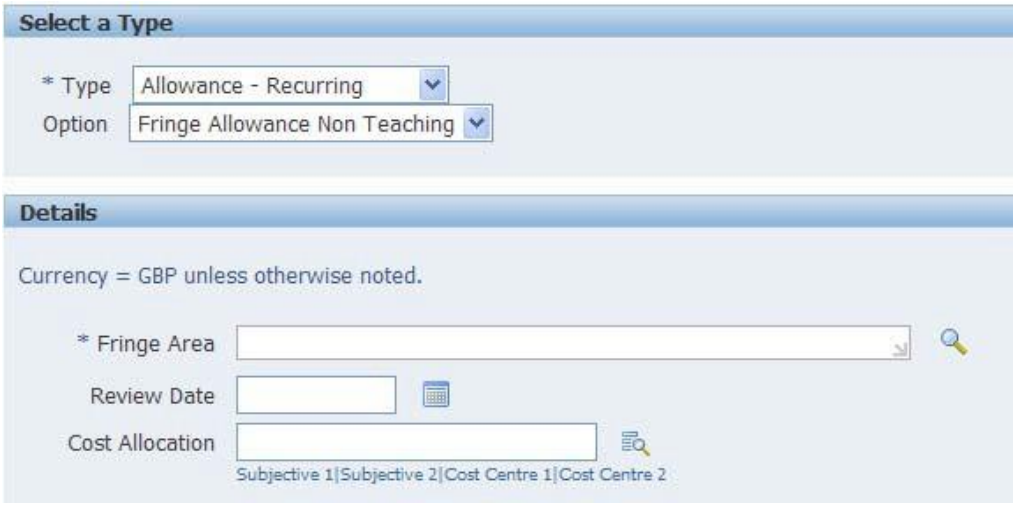
In **Example 1**, the system prompts you to enter the appropriate amount. Carefully take note of whether the system is asking for the full-time equivalent or actual amount to pay and whether that should be the annual or monthly figure.

In **Example 2**, the system prompts you to use the icon in order to pick from a preset list of available items. e.g. Outer or Inner Fringe.

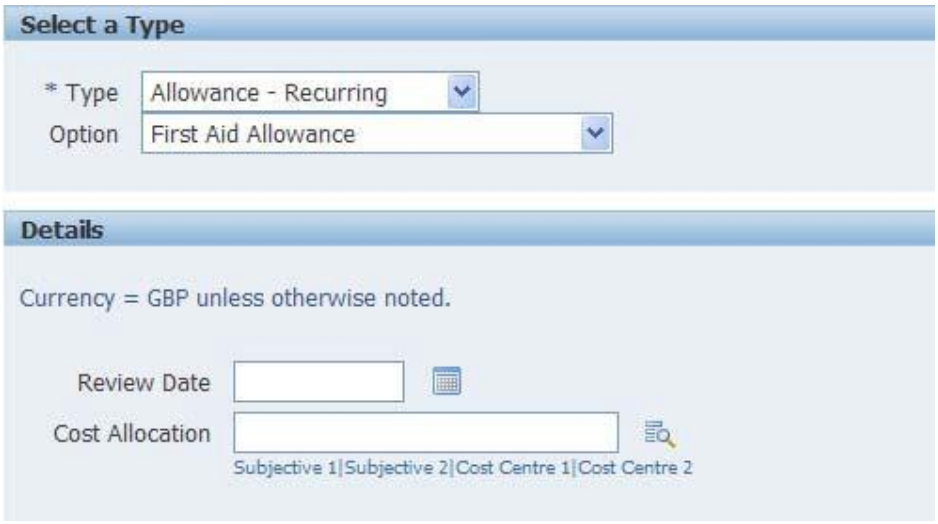
In **Example 3**, the allowance has a fixed pre-set value and you do not need to provide any additional information.

Example 1: An allowance that requires you to specify a value

Example 2: An allowance that requires you to pick from a table of options



Example 3: An allowance with a fixed value that does not require any other data to be added



7. Complete all mandatory fields as indicated with an asterisk *

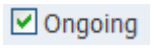
TIP: Each element can optionally be given a **Review Date**. You can enter a date or pick one from the calendar control. Shortly before the entered date comes around Payroll will provide you with a reminder. Please note that the element will not be automatically ended on that date.

TIP: All allowances are automatically costed to the employee's main cost code. You should only make an entry in the **Cost Allocation** field in those exceptionally rare cases where you need to cost the payment to a different code.

TIP: Where you want to enter a **Cost Allocation** code you need to input the separator | symbol between each segment. e.g. 01|30|RB05|0000 The separator or "pipe" symbol is on the keyboard between the shift key and the Z key.

8. Optionally complete the Review Date and/or Cost Allocation fields as required. (See **TIP**s above).

9. Modify the **Effective From** date as required. It will initially display today's current date.

10. Optionally, if you know that the element is temporary and will definitely cease on a known future date then you can enter that information now. By default, the 

checkbox is ticked denoting that it is permanent but by clicking that box the system will provide an **End Date** field where you can specify the date on which the element should cease. **We recommend that you don't use this feature in temporary or fixed term contract cases as you would have to constantly update the element end dates as and when those contracts are extended as they frequently are.**

11. Click

The new item will now be shown on the screen with a status of New

12. Repeat from step 4 for each other element that you wish to add.

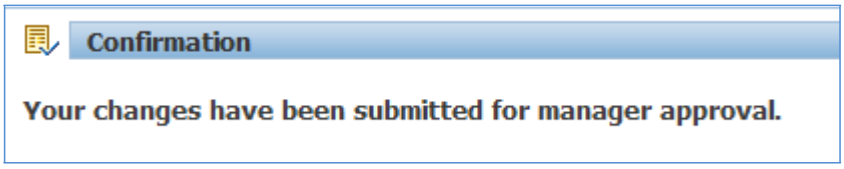
13. Click Next

On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 4 and then select the appropriate Update/View icon to make any alterations.

14. Optionally click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

15. Click the Submit button.

A message at the top left hand corner of the screen will now display:



16. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an element change (an Individual Compensation Distribution change) for that employee and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

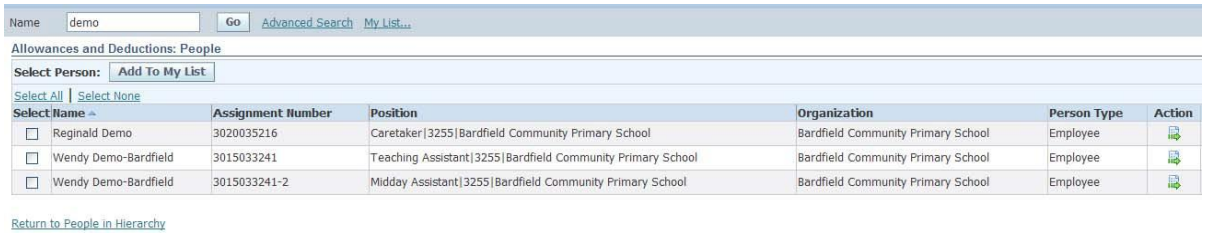
How to change an existing allowance or deduction

You are most likely to use this process where you want to update the amount to pay for an allowance that does not have a fixed full time equivalent base value for all employees. e.g. Teacher Learning Responsibility.

You may also be using this process to add/modify the Review Date for an element or to modify the cost code allocation.

1. Select Allowances and Deductions from the main menu.

2. Search for the employee using the standard search technique fully described on page 9



   Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.

4. From the list of elements currently applied to the employee click the appropriate Update/View icon

The screen will then refresh and display the currently held details for the selected element. The contents of this section are variable according to the element that you selected at step 4. These variations are fully described in the previous section **How to add an allowance or deduction**.

5. Make the amendments as required making sure all mandatory fields as indicated with an asterisk * are completed and that you supply an effective date for the changes to be made from. (See step 7 as later described).

TIP: Each element can optionally be given a **Review Date**. You can enter a date or pick one from the calendar control. Shortly before the entered date comes around Payroll will provide you with a reminder. Please note that the element will not be automatically ended on that date.

TIP: All allowances are automatically costed to the employee's main cost code. You should only make an entry in the **Cost Allocation** field in those exceptionally rare cases where you need to cost the payment to a different code.

TIP: Where you want to enter a **Cost Allocation** code you need to input the separator | symbol between each segment. e.g. 01|30|RB05|0000 The separator or "pipe" symbol is on the keyboard between the shift key and the Z key.

6. Optionally complete the Review Date and/or Cost Allocation fields as required. (See **TIP**s above).

7. **Important**: Modify the **Effective From** date field by entering the date that the change is to apply from. This will initially display the date that the element was last changed or originally effective from but that will rarely be the date you want the latest change to be from.

8. Optionally, if you know that the element is temporary and will definitely cease on a known future date then you can enter that information now. By default, the Ongoing checkbox is ticked denoting that it is permanent but by clicking that box the system will provide an **End Date** field where you can specify the date on which the element should cease. **We recommend that you don't use this feature in temporary or fixed term contract cases as you would have to constantly update the element end dates as and when those contracts are extended as they frequently are.**

Effective Date
This Transaction Occurs Every Payroll Period Until The End Date.
Effective From * 16-Dec-2011
End Date *
Ongoing

9. Click Apply

The item will now be shown on the screen with a status of Updated

10. Repeat from step 4 for each other element that you wish to add.

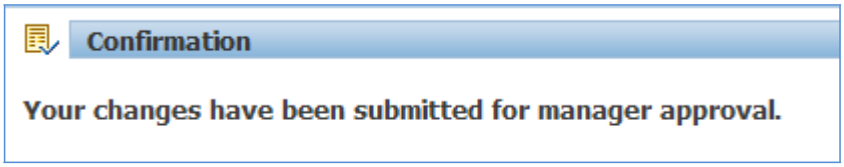
11. Click Next

On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 4 and then select the appropriate Update/View icon to make any alterations.

12. Optionally click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

13. Click the Submit button.

A message at the top left hand corner of the screen will now display:



14. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an element change (an Individual Compensation Distribution change) for that employee and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to delete an existing allowance or deduction

You are most likely to use this process where an allowance is no longer applicable, possibly connected to an assignment change that you have also made or are about to make from the same effective date.

1. Select Allowances and Deductions from the main menu.

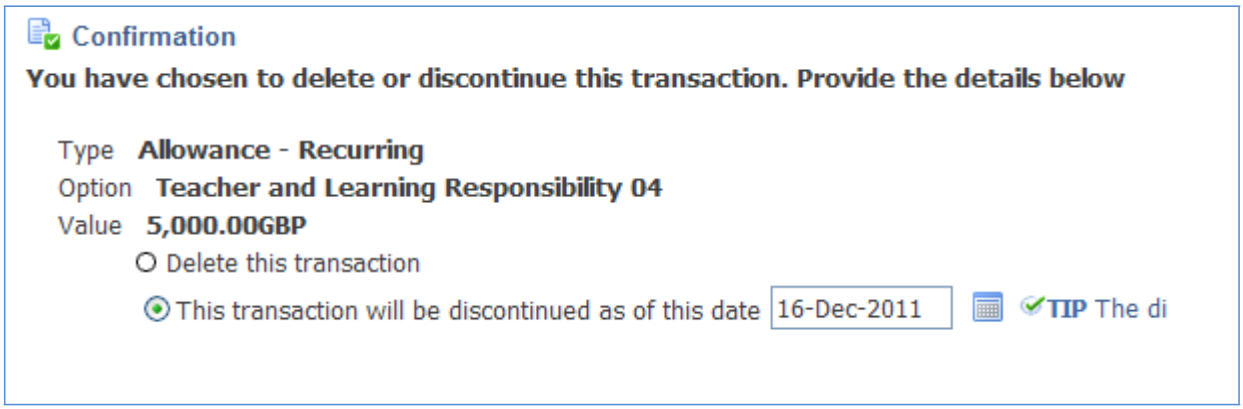
2. Search for the employee using the standard search technique fully described on page 9

Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the deletion altogether.

3. From the list of names displayed click the appropriate "Action" icon.

4. From the list of elements currently applied to the employee click the appropriate Delete/Discontinue icon

The screen will then refresh and display a message similar to the following example:


Confirmation
You have chosen to delete or discontinue this transaction. Provide the details below
Type Allowance - Recurring
Option Teacher and Learning Responsibility 04
Value 5,000.00GBP
Delete this transaction
This transaction will be discontinued as of this date
16-Dec-2011
TIP The di

5. Amend the effective date as appropriate noting that the discontinue date entered will be the last day that the item will be paid/deducted up to. It will initially display today's current date.

6. Click Yes to confirm that you wish to continue else No to cancel.

7. The item will now be shown on the screen with a status of Discontinued

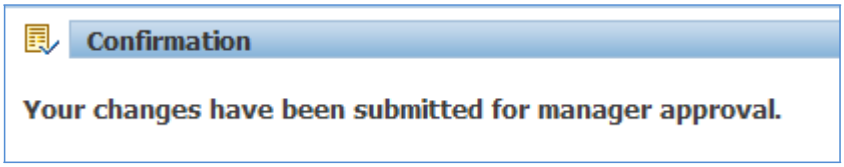
8. Click Next

9. On the review page that is now shown check that the entries you have made are correct. If you change your mind at this stage you can still select Back and then Cancel to abandon the deletion request.

10. Optionally click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

11. Click the Submit button.

A message at the top left hand corner of the screen will now display:



12. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an element change (an Individual Compensation Distribution change) for that employee and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

Assignment Change

Introduction

The Assignment Change menu item will be one of the most frequently used forms as it will typically be used to update employee hours per week, full-time %, grade, spinal column point and increment settings.

This form can also be used to view and and/or amend the employee's position, pension scheme details and review date.

Important Notes

- Occasionally, the system may advise you that a **future dated transaction** is already held awaiting processing at the appropriate time. In these cases, when the transactions are approved by the school's approver they are not immediately updated on the payroll system but are sent to the payroll processing team for their intervention. In order to ensure that these changes are processed quickly and accurately the school Approver should add appropriate instructions in the comments box when approving the transaction. These instructions are then relayed to the payroll processing team and avoids them having to refer it back again for clarification. The instructions should specify what action is now required for that future dated change. i.e. whether the earlier dated transaction replaces it or is in addition to it.

- Before entering any changes for an employee who is on maternity leave or a gradual return to work programme, please call or email the Corporate Service Centre to seek appropriate advice to ensure that the integrity of those complex payment schemes are not compromised.

Pension Scheme Rules

- You must only ever alter pension scheme entries on receipt of the appropriate written authority to do so. This will either be form PN16 for Local Government Pension Scheme employees or a confirmation letter from the Teachers' Pension Agency for teaching staff.

  Once actioned, form PN16 should be forwarded to the Pensions Team at County Hall.

- Change from Relief to Contract: in these cases the employee **must** be brought into the Local Government Pension Scheme (LGPS).

- Change from Contract to Relief: in these cases the employee **must** be removed from the LGPS. This is achieved by selecting 'None' from the options provided for the Pension Scheme field.
- Fixed terms contracts extending beyond 3 months should be opted into the Local Government Pension Scheme (LGPS).

How to edit an employee's assignment details

Whilst this section only describes the basic operation of the Assignment Details form, a list of specific hints & tips is included in the guide under the heading Hints & Tips For New Appointments and Assignment Changes

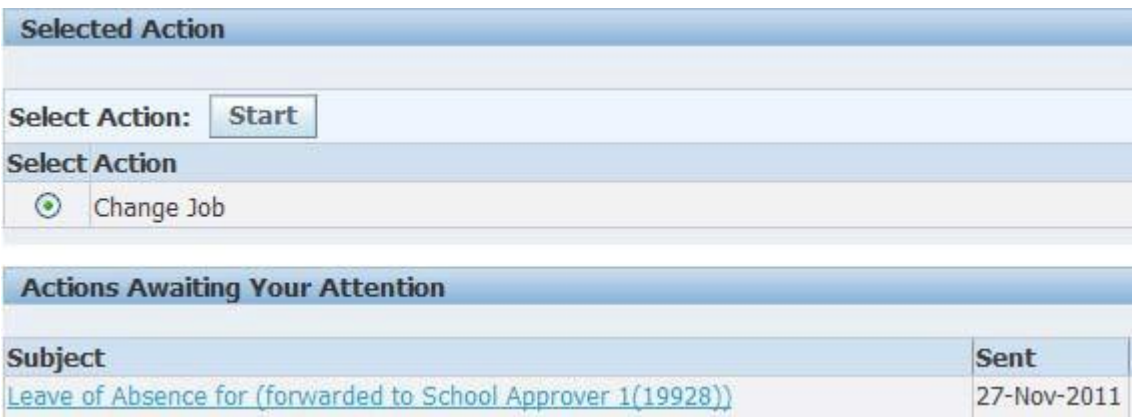
1. Select Assignment Change from the main menu.

2. Search for the employee using the standard search technique fully described on page 9

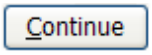
   Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.

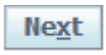
4. In most cases you will be directed straight to step 5, but where the system detects that the employee has some other outstanding transaction awaiting approval then you may now see a display similar to the example shown below. In these cases simply click the Start button.



5. Use one of the calendar controls else type in the required Effective Date.

6. Click 

7. Amend the field or fields as appropriate. See Hints & Tips For New Appointments and Assignment Changes earlier in this guide for specific guidance regarding some of the fields included on this form.

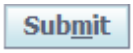
8. Click 

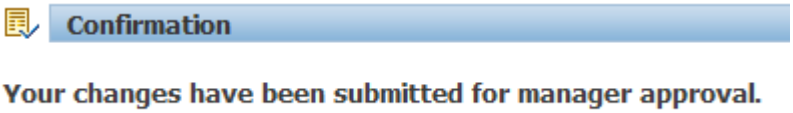
9. On the review page that is now shown check that the entries you have made are correct. If you detect an error select

to go back to step 7.

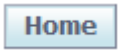
10. Click the

button if you wish to print a copy of the review page or to save a copy of it.

11. Click the 

button. You will then see the following


message:

12. Click 

You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an assignment change transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

Assignment Costing

Introduction

This form controls the expenditure code that will be used when creating journal file entries for your employees.

For Central Payment schools employee costing is automatically derived based on the employee's Position and cannot be over-ridden.

For other schools this form can be used to allocate costs according to each of your individual requirements and chart of account structures. However, you can only apply costing codes that have been previously established as valid within the main payroll system.

Important Notes

This form can only be used to modify an existing expenditure code. As such, if you omitted adding a cost code for an employee during the New Hire or Additional Assignment process and now need to rectify that omission then you will need to submit details to the Corporate Service Centre using the retained function communication template form.

How to amend an employee's assignment costing

1. Select Assignment Costing from the main menu.

2. Search for the employee using the standard search technique fully described on page 9

   Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.

4. In most cases you will be directed straight to step 5, but where the system detects that the employee has some other outstanding transaction awaiting approval then you may now see a display similar to the example shown below. In these cases simply click the Start button.

5. Use one of the calendar controls else type in the required Effective Date.

6. Click Continue

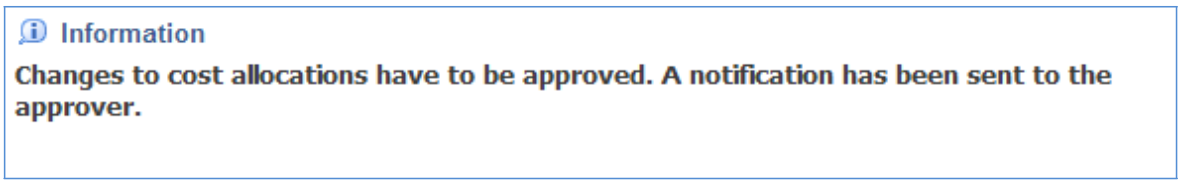
7. Overtype or re-enter the amended code as required.

TIP: Although the system provides a search feature for expenditure codes it can be quite time consuming and a little clunky to operate such that entries are much more easily made by simply typing in the code – see also NOTE below.

NOTE: Expenditure code entries require the separator | symbol between each segment. e.g. 01|30|RB05|0000 The separator or "pipe" symbol is on the keyboard between the shift key and the Z key.

8. Click the Submit button

   A message at the top left hand corner of the screen will now display:



9. Click OK You will then be returned to the Main Menu and Worklist home page.

Approvals

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

Employee Bank Details

Important Notes

- DO NOT use the process described here for adding bank details for a new appointment – you MUST always use the **New Hire Part 2** or **Additional Assignment Part 2** menu items for that purpose.

- Bank details are separately held against each assignment that an employee has. If an employee has more than 1 assignment then amendments would need to be entered and approved for each one.

- Please ensure that all the information entered is checked thoroughly as errors may result in delays in the crediting of the employee's salary payment.

- This transaction type needs to be approved before payroll is updated. If you make an enquiry on an employee's bank details after a change has been entered but before they have been approved then only the old details will be displayed.

- For LBA and Academy schools that allow employees to be paid by cheque you will need to email the Corporate Service Centre if you want to amend their payment to cheque. The template form for this and details of information that you need to quote in the email can be found on the Essex Schools InfoLink .

- Exceptionally, an employee's pay may be distributed to more than one bank account. If you need to add or amend 2 or more sets of bank details for an employee then each change must be submitted for approval separately.

How to change an employee's bank details

1. Select Employee Bank Details from the main menu

2. Search for the employee using the standard search technique fully described on page 9

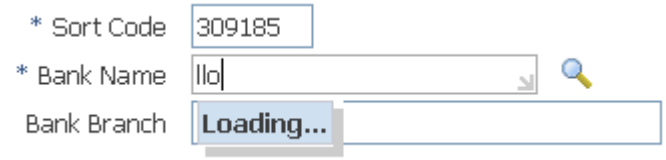
3. From the list of names displayed click the appropriate "Action" icon.

Note: from this point you can select the Cancel button at any time to abandon the edit.

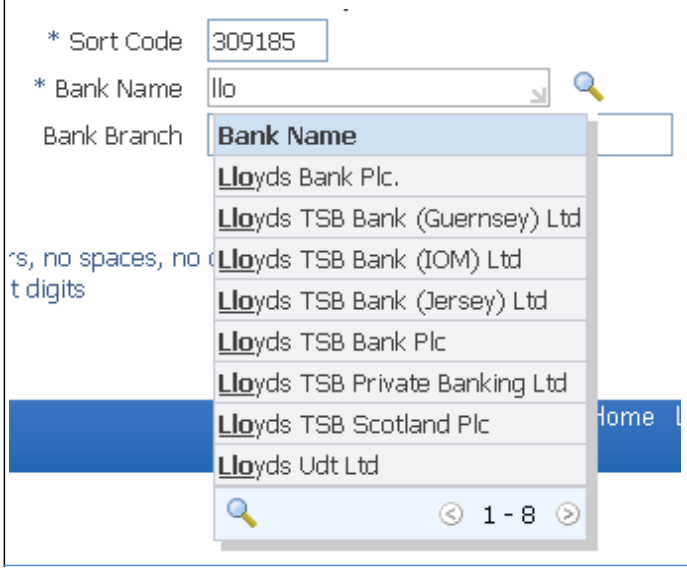
4. Click the "Update" icon.

5. Amend the details as required

TIP: to change the **Bank Name**, remove the current contents and then type the first 3 characters of the new bank name. The system will then briefly show that it is loading items,



before then displaying those that you can choose from:



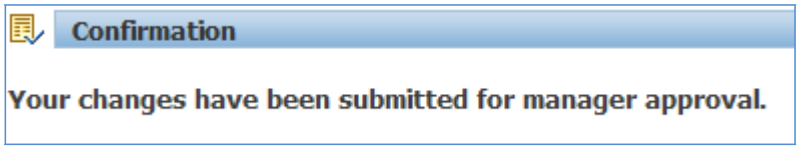
6. Click Apply

7. Click Continue

8. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 4.

9. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

10. Click the Submit button. You will then see the following message:



11. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a bank change transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to distribute net pay across 2 or more bank accounts

Net pay can be distributed across 2 or more bank accounts. Payments into the additional account(s) can be specified as being a fixed sterling amount or expressed as a percentage of net pay. Payments into the main account are always expressed as "remaining pay". i.e. whatever is left after the distribution to the other account(s) have been allocated.

Once created, editing the details for each additional account is achieved using the same techniques described earlier.

To add a new additional set of bank details:

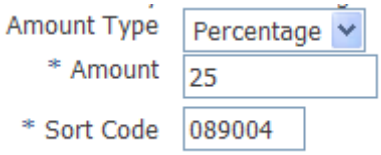
1. Select Employee Bank Details from the main menu
2. Search for the employee using the standard search technique fully described on page

3. From the list of names displayed click the appropriate "Action" icon.

4. Note: from this point you can select the Cancel button at any time to abandon the edit.

5. Click the Add Bank Payment button.

6. Add the bank details as required. In the **Amount Type** field select whether you want this account to be credited with a fixed sterling amount (by selecting "Monetary") or a "Percentage" of net pay. The value entered in the **Amount** field is then treated as £p or as % as appropriate.



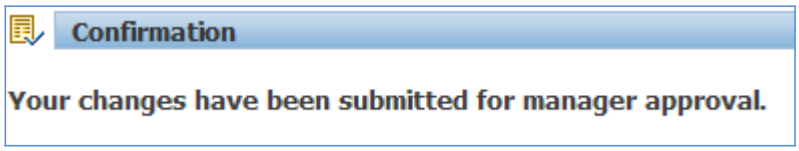
7. Click Apply

8. Click Continue

9. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 4.

10. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

11. Click the Submit button. You will then see the following message:



12. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a bank change transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

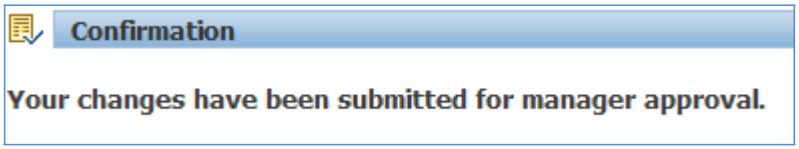
Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to delete a secondary bank account

Multiple bank account records can be deleted as required but at least 1 entry must remain; the system will not allow you to delete all bank account records. Where the deletion(s) that you make result in only 1 entry remaining then that entry will automatically be amended to an “All Remaining Pay” type even if it was previously held as a fixed £p (Monetary) type or as a percentage of net pay type.

1. Select Employee Bank Details from the main menu
2. Search for the employee using the standard search technique fully described on page 9

3. From the list of names displayed click the appropriate ”Action” icon.
4. Click the ”Delete” icon for the appropriate bank account.
5. Click Continue
6. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 4.
7. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.
8. Click the Submit button. You will then see the following message:



9. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a bank change transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

Employee Personal Information

Introduction

The Employee Personal Information menu item can be used to review and update an employee's personal details such as name, home address, marital status and ethnic origin.

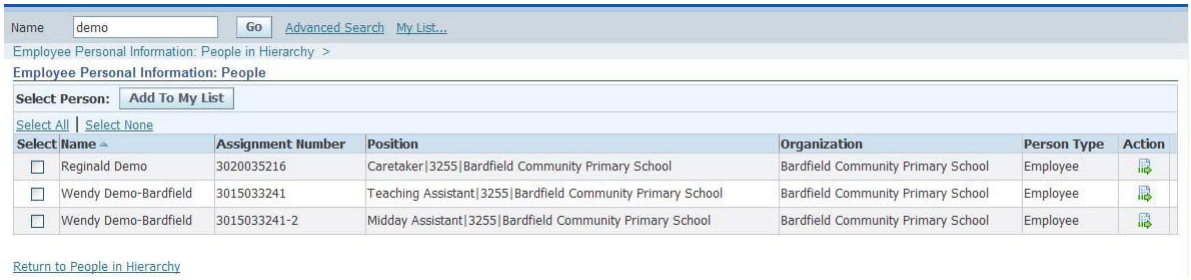
Optionally, ePayroll can also be used to manage employee telephone details and emergency contacts. These are not further detailed in this guide but the concepts for maintaining them are the same as shown below.

Important Notes

- Changes made via this menu item do not require manager approval and are immediately updated onto the payroll system.
- The Email Address field is designed to store the address of ePayroll users only and should not be used to generally record details for all employees.
- If you are making enquiries only and do not intend to make changes then simply follow the guidance shown below as if you were making a change but ultimately click the Cancel button rather than submitting the change.

How to change an employee's basic personal details

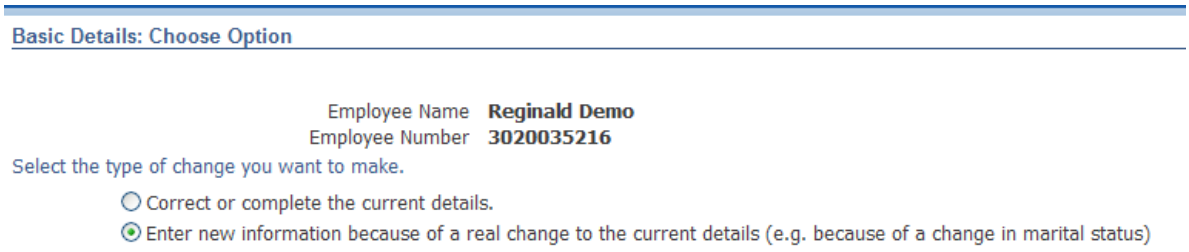
1. Select Employee Personal Information from the main menu.
2. Search for the employee using the standard search technique fully described on page 9



3. From the list of names displayed click the appropriate "Action" icon.
4. Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

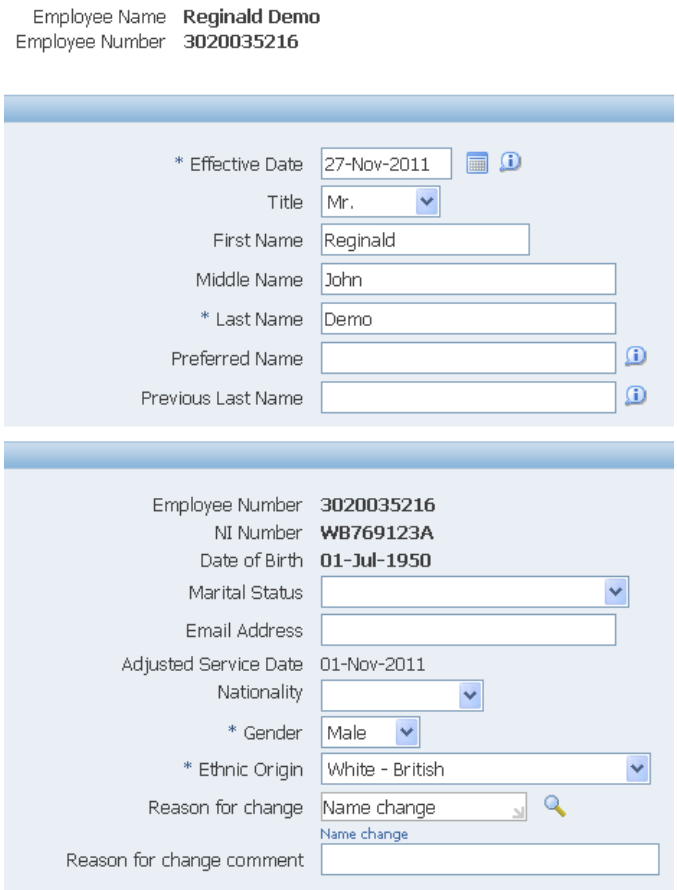
5. In the Basic Details section click the Update button. Exceptionally, the update button will not be shown but will be replaced by View Future Changes. This indicates that a future dated change already exists. In these cases, the system will not allow you to make further updates until that time.

6. Select the option that best reflects the change that you are making. By default, the system assumes that you are updating the employee's details because of a real change in their circumstances. However, if the details currently held were never correct to begin with or were incomplete then you should select the "correct" item.


Basic Details: Choose Option
Employee Name Reginald Demo
Employee Number 3020035216
Select the type of change you want to make.
Correct or complete the current details.
Enter new information because of a real change to the current details (e.g. because of a change in marital status)

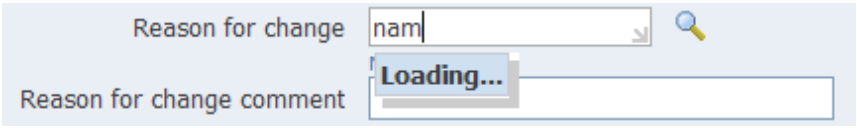
7. Click Next

8. Amend the details as advised by your employee.

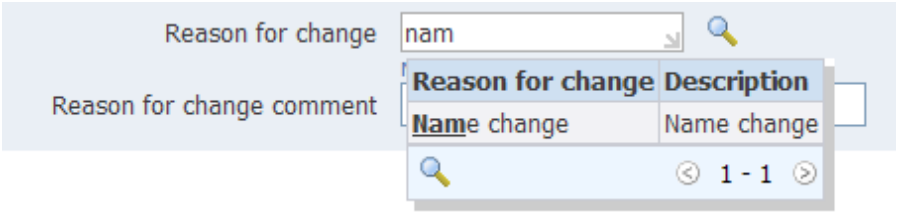


TIP: if changing the employee's last name then enter their previous last name in the field shown. This will often prove useful when responding to enquiries from mortgage companies, solicitors and other similar organisations.

TIP: for the **Reason for Change** field, rather than using the feature remove the current contents from the field then type in the characters nam. The system will then briefly display that it is loading items:



before displaying those that you can then choose from:



The same technique can also be used for marriages by typing in **mar** instead of **nam**

9. Click Next

10. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 7.

11. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

12. Click the Submit button. You will then see the following message:

Your changes have been applied.

13. Click Return to Overview then either click Back to search for another employee or the Home link at the top of the screen to return to the main menu and Worklist.

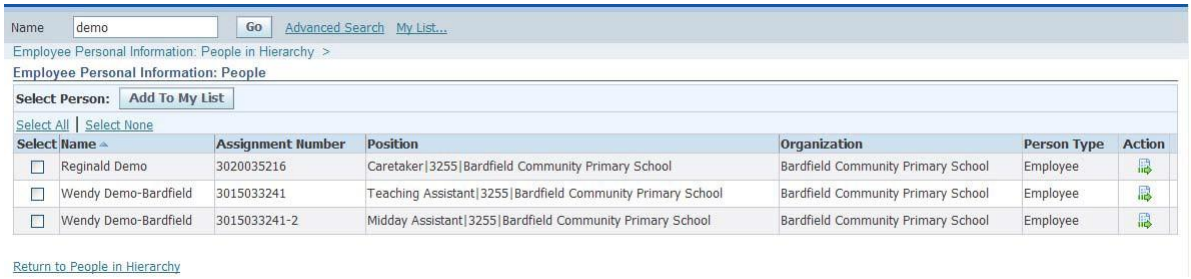
Approvals

These changes do not require approval but are immediately updated onto the payroll system. An item sent by SYSADMIN will however now appear in your Worklist confirming that you have successfully updated the personal detail changes.

How to change an employee's home address

1. Select Employee Personal Information from the main menu.

2. Search for the employee using the standard search technique fully described on page 9

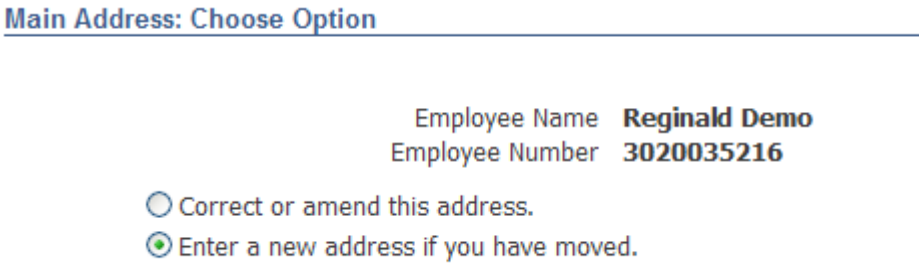


3. From the list of names displayed click the appropriate "Action" icon.

4. Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

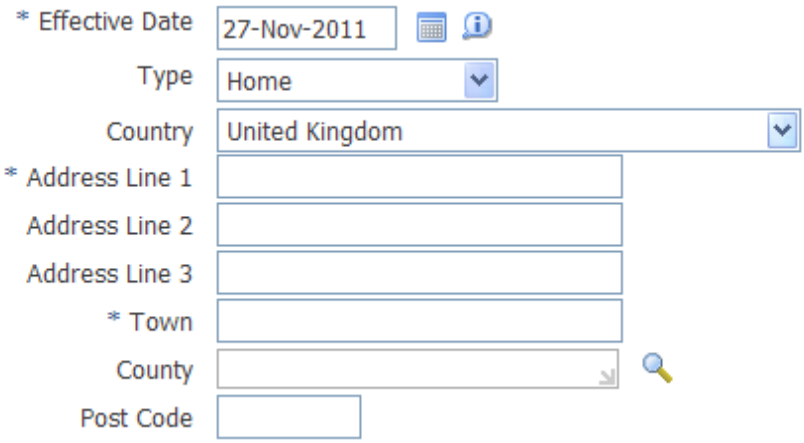
5. In the Main Address section click the Update button. Exceptionally, the update button will not be shown but will be replaced by View Future Changes This indicates that a future dated change already exists. In these cases, the system will not allow you to make further updates until that time.

6. Select the option that best reflects the change that you are making. By default, the system assumes that you are updating the employee's details because of a real change in their circumstances. However, if the details currently held were never correct to begin with or were incomplete then you should select the "correct" item.


Main Address: Choose Option
Employee Name Reginald Demo
Employee Number 3020035216
Correct or amend this address.
Enter a new address if you have moved.

7. Click Next

8. Enter the revised details or make corrections as appropriate. By default, the **Effective Date** field will show the current (today's) date but this can be changed should you wish to.

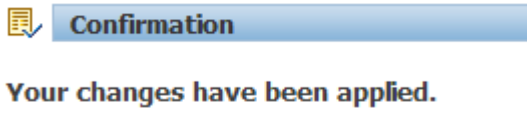


9. Click Next

10. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 7.

11. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

12. Click the Submit button. You will then see the following message:



13. Click Return to Overview then either click Back to search for another employee or the Home link at the top of the screen to return to the main menu and Worklist.

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully updated the personal details.

Leavers

Introduction

This section contains details of 3 transaction types covering the range of notifications you may need to make when an employee leaves your employment or ends one of their multiple assignments. These are:

- Termination
- End Assignment
- Termination Payments

Each of these is shown as separate items on the main menu.

The Termination menu item is used in all cases where the employee only has one assignment.

The End Assignment menu item is used where the employee has more than one assignment still remaining.

The Termination Payments menu item can optionally be used in connection with either of the other 2 processes where you need to make a special payment because of the employment ending such as a compromise, redundancy, annual leave or payment in lieu of notice.

Important Notes

- After a **Termination** or **End Assignment** transaction has been approved by the school approver, a notification is automatically routed to payroll's processing team who review the entries made and make any technical alterations as found necessary.
- Leaver transactions approved after the published submission deadline might not be automatically processed in time for the current month's payroll. In these cases and where an overpayment may otherwise result you should contact the Corporate Service Centre and seek their advice.
- Where a special **Termination Payment** is required, these details are best entered and approved prior to submitting the Termination or End Assignment transaction. If you are consequently unable to enter the termination payment you should call or email the Corporate Service Centre to seek appropriate advice.

- If the employee being terminated is on maternity leave or on a gradual return to work programme please call or email the Corporate Service Centre to seek appropriate advice.

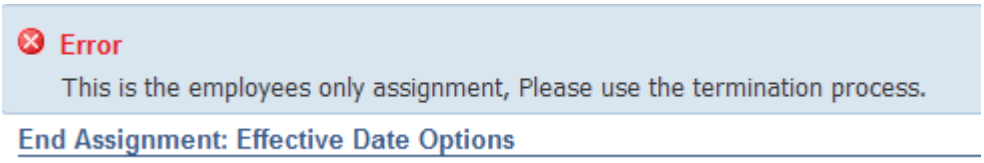
- You cannot alter the leaving date after the transaction has been approved. When this is necessary you should call or email the Corporate Service Centre to seek appropriate advice.

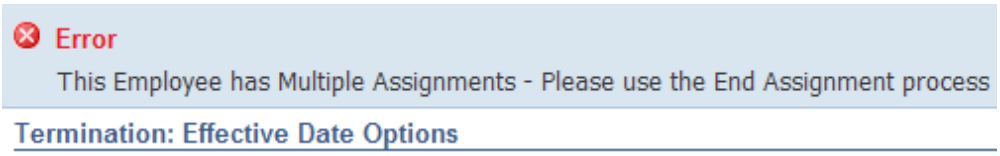
How do I know whether to pick Termination or End Assignment?

In most cases the enquiries you make on the employee when using the standard search technique fully described on page 9 will confirm whether the employee has multiple assignments.

For Central Payment schools the enquiry will only display the assignments that the employee has at your school but not those at other Central Payment schools and it is therefore possible that you might select the wrong option.

However, in the event that you do pick the wrong option the system will confirm such by displaying one of the following error messages and directing you to use the alternative process:


Error
This is the employees only assignment, Please use the termination process.
End Assignment: Effective Date Options


Error
This Employee has Multiple Assignments - Please use the End Assignment process
Termination: Effective Date Options

How to enter a Termination transaction

1. Select Termination from the main menu.

2. Search for the employee using the standard search technique fully described on page 9

Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.

4. In most cases you will be directed straight to step 5, but where the system detects that the employee has some other outstanding transaction awaiting approval then you may now see a display similar to the example shown below. In these cases simply click the Start button.

5. Use one of the calendar controls else type in the required Termination Date.

6. Click Continue

7. The screen will refresh and the main body of it display something similar to the following:

Check that the Termination Date is correct and select a Reason from the list-box that best describes why the employee is leaving.

TIP: Last Standard Process Date is the month end date of the month in which the employee is leaving.

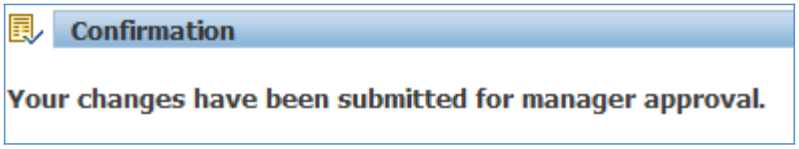
TIP: Final Process Date is the month end date of the period that the employee's payroll record will remain open for making subsequent payments for late notified expense and overtime claims and other similar adjustments.

8. Click Next

9. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 7.

10. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

11. Click the Submit button. You will then see the following message:



12. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a Termination transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

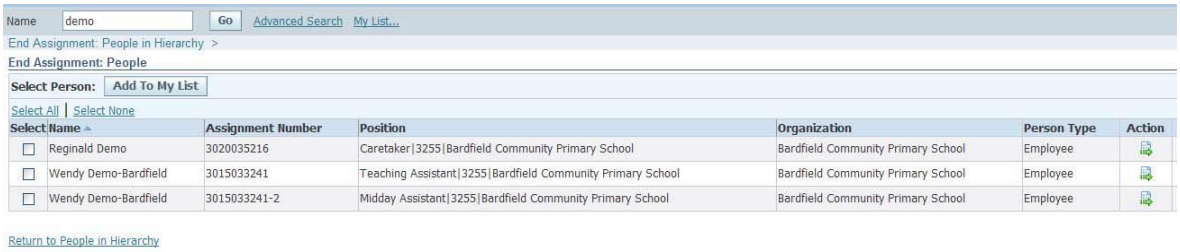
If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to enter an End Assignment transaction

1. Select End Assignment from the main menu.

2. Search for the employee using the standard search technique fully described on page 9



Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

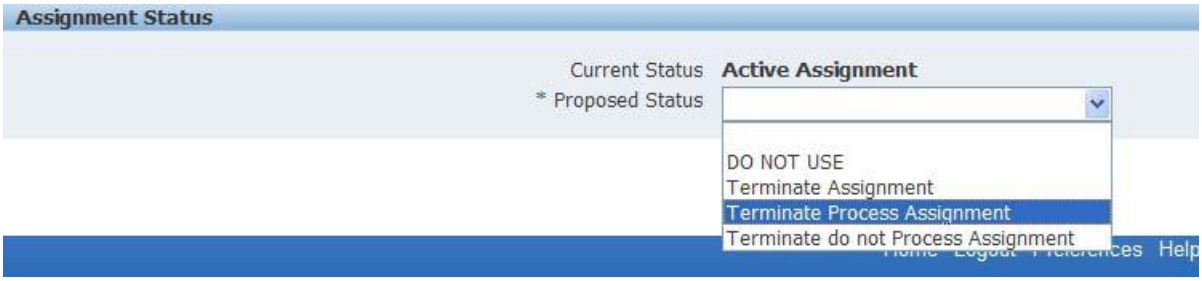
3. From the list of names displayed click the appropriate "Action" icon.

4. In most cases you will be directed straight to step 5, but where the system detects that the employee has some other outstanding transaction awaiting approval then you may now see a display similar to the example shown below. In these cases simply click the Start button.

5. Use one of the calendar controls else type in the required Termination Date.

6. Click Continue

7. After the screen has refreshed select **Terminate Process Assignment** from the **Proposed Status** list-box.

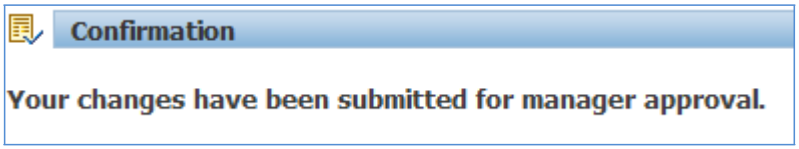


8. Click Next

9. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 7.

10. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

11. Click the Submit button. You will then see the following message:



12. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a Termination transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to make a Termination Payment

1. Select Termination Payments from the main menu.

2. Search for the employee using the standard search technique fully described on page 9

Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.
4. Click the Add New Allowances/Deductions button.
5. Select a **Type** from the list box now shown. The only option available will be **Terminations**.
6. The screen will then refresh and display an **Option** list-box. Select the option (choose the element) that you require.

The screen will then refresh and display a Details section. The contents of this section are variable according to the element that you selected at step 6 will normally require you to specify a £p value to pay similar to the following example:

7. Complete all mandatory fields as indicated with an asterisk *
8. Optionally complete the Cost Allocation field as required. (See **TIP** below).

TIP: All allowances are automatically costed to the employee's main cost code. You only need make an entry in the **Cost Allocation** field where you need to cost the payment to a different code.

TIP: Where you do enter a **Cost Allocation** code you need to input the separator | symbol between each segment. e.g. 01|30|RB05|0000 The separator or "pipe" symbol is on the keyboard between the shift key and the Z key.

9. Click Apply

The new item will now be shown on the screen with a status of New

10. Repeat from step 4 for each other element that you wish to add.

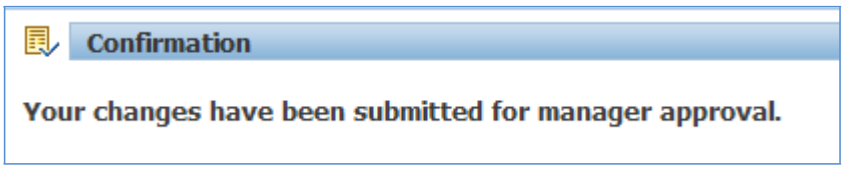
11. Click Next

On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 4 and then select the appropriate Update/View icon to make any alterations.

12. Optionally click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

13. Click the Submit button.

A message at the top left hand corner of the screen will now display:



14. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an element change (an Individual Compensation Distribution change) for that employee and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

New Appointments & Additional Assignments

Introduction

ePayroll provides separate processes to distinguish between those cases where you are adding a new employee and those where you are adding an additional assignment for an existing employee. These options are accessed via the following menu list:

- ePayroll School New Appointment, Essex Schools
  - New Hire (2 Stage Process)
    - Stage 1
    - Stage 2
  - Additional Assignment (2 Stage Process)
    - Stage 1
    - Stage 2

The **New Hire** and **Additional Assignment** processes are both split across 2 stages. Stage 1 includes entering personal (name, address, date of birth etc) and assignment (job, hours, grade etc) details. In Stage 2, bank details, allowances and cost code information is then added.

It is only after the completion of Stage 2 that the complete transaction is sent for approval.

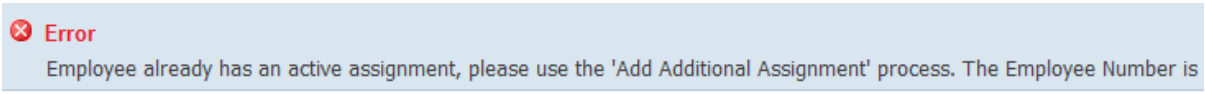
The New Hire and Additional Assignment processes are identical with the exception that the Additional Assignment method does not require the submission of personal and home address information as these will already be held in the system against the existing employee record.

How do I know whether to select New Hire or Additional Assignment?

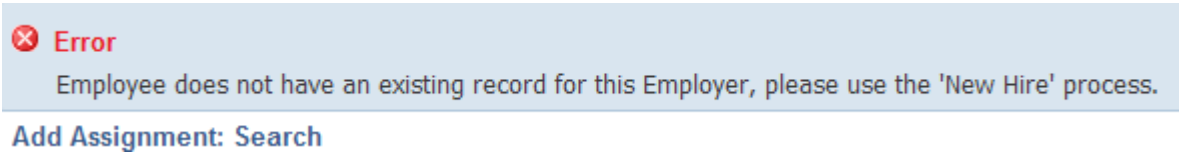
Ultimately, the system will provide appropriate advice where you have ventured into the wrong option by mistake and will do so at a very early stage in the process.

For Local Bank and Academy schools this is just a simple question as to whether the person is already employed by your organisation or not. For Central Payment schools, you additionally need to take into account whether the person is already engaged by another Central Payment school.

Where you have selected the New Hire process incorrectly the following message will be displayed including reference to the employee's existing payroll number.


Error
Employee already has an active assignment, please use the 'Add Additional Assignment' process. The Employee Number is

Where you have selected the Additional Assignment process incorrectly the following message will be displayed.


Error
Employee does not have an existing record for this Employer, please use the 'New Hire' process.
Add Assignment: Search

In both cases you will then need to click the Home link

as shown at the top right hand corner of the screen. This will return you to the home page and main menu.

Note that when the system is making these assessments and decisions it treats any existing employee who is leaving as if they had already left. i.e. where a termination transaction has been submitted and approved but where the effective date has not yet passed.

Important Information

- For technical reasons these processes are split across 2 separate stages. After completion of Stage 1 a partial (incomplete) record is held on the payroll system waiting for Stage 2 to be completed and approved.
- After completion of Stage 1 an entry will appear on the administrator's Worklist advising that the New Hire has been approved but this only confirms that Stage 1 is complete.
- The transaction will only be sent to an approver for approval after Stage 2 has been submitted. Only at that point is the record updated so that payments can be generated.
- **TIP:** for future dated appointments we recommend that you delay making the approval until the employee has commenced duties. In this way, if the employee does not take up the appointment you can cancel the transaction simply by the Approver rejecting it. If you had already approved the transaction you will need to contact the Corporate Service Centre requesting them to purge the record.
- Forms P45, P46, and NI Age Exemption cards should be forwarded to Essex Payroll by post. We are not allowed to accept scanned or faxed copies.
- Where provided, form PN16 should be forwarded to Essex Pensions by post.

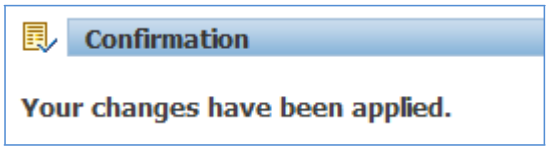
How to enter a New Appointment

1. Select Stage 1 from the **New Hire (2 Stage Process)** menu
2. Enter the basic details requested on the following form

TIP: we recommend that you enter the employee's last name in proper case e.g. Smith and not smith or SMITH.

Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the New Hire altogether.

3. Click Continue
4. Enter the employee's 'Person Details' and click Next
5. The 'Extra Information' details page is entirely optional. Complete else ignore as you decide then click Next
6. Enter the employee's assignment details as appropriate. Refer to 99 for specific guidance and tips on how to complete these fields
7. Click Next and then click Next again.
8. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back and then Back again to go back to step 6 and make any alterations.
9. Optionally click the Printable Page button if you wish to print a copy of the review page or to save copy of it.
10. Click the Submit button.
11. A message at the top left hand corner of the screen will now display:



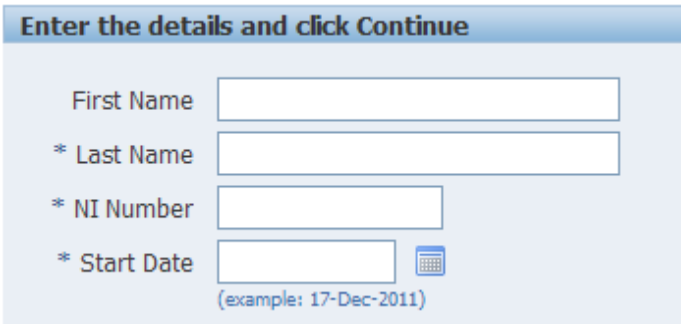
12. Click Home You will then be returned to the Main Menu and Worklist home page.

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a New Hire for that employee and that it has been approved.

REMEMBER – at this stage you have only created a partial record. You have NOT YET COMPLETED the overall process.

13. Select Stage 2 from the **New Hire (2 Stage Process)** menu

14. Confirm the employee's name, NI Number and start date and click Continue



TIP: It is essential to enter the employee's **Last Name** in the same case style as you did when entering details in Stage 1 else the system will not find a match. e.g. if you entered Smith in Stage 1 then entries of smith or SMITH now would result in an error.

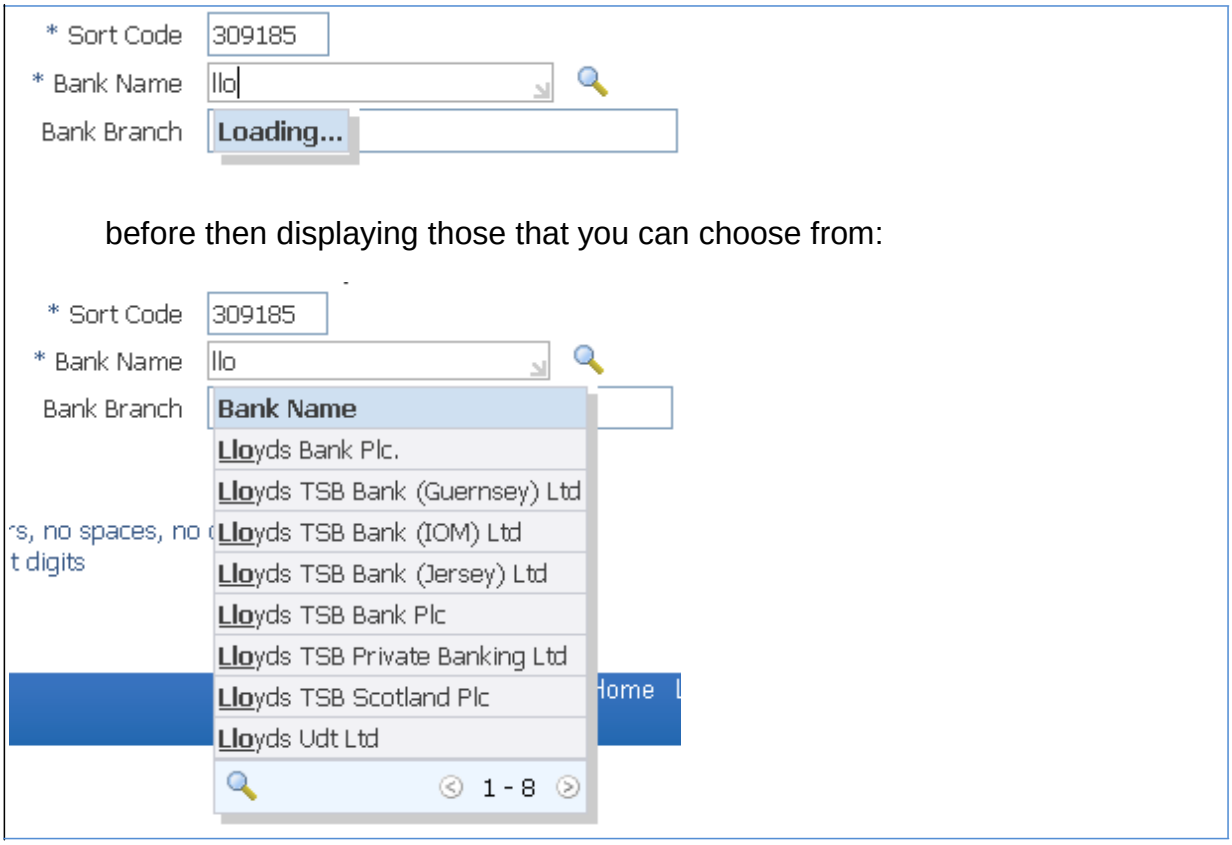
TIP: ignore the **First Name** field and leave it blank.

15. From the list of names displayed click the appropriate "Action" icon.

16. In the Bank Details section click Add

17. Enter the employee' Bank Details and then click Apply

TIP: to enter the **Bank Name**, type the first 3 characters of the new bank name. The system will then briefly show that it is loading items as shown below:



before then displaying those that you can choose from:

18. For Central Payment Schools, the **Schools Assignment Costing** area will already be automatically populated and you should proceed to step 20.

    For other schools, in the **Schools Assignment Costing** area click the **Add** button.

TIP: Although the system provides a search feature for each segment of the expenditure code it can be quite time consuming and a little clunky to operate such that entries are much more easily made by simply typing in the code.

TIP: Subjective 1 is the first 2 characters of the expenditure code.

Subjective 2 is the next 2.

Cost Centre 1 is the middle 4 characters

Cost Centre 2 is the last 4 characters

19. Click Apply
20. Click Next
21. If you need to add any additional allowances (typically non-teaching Fringe or Teacher Responsibility) then click the Add New Allowances/Deductions button else proceed directly to step 30.
22. Select a **Type** from the list box now shown. This will normally be **Allowance – Recurring**.
23. The screen will then refresh and display an **Option** list-box. Select the option (choose the element) that you require.

The screen will then refresh and display a Details section. The contents of this section are variable according to the element that you selected at step 23. There are 3 commonly used variations, examples of which are shown below.

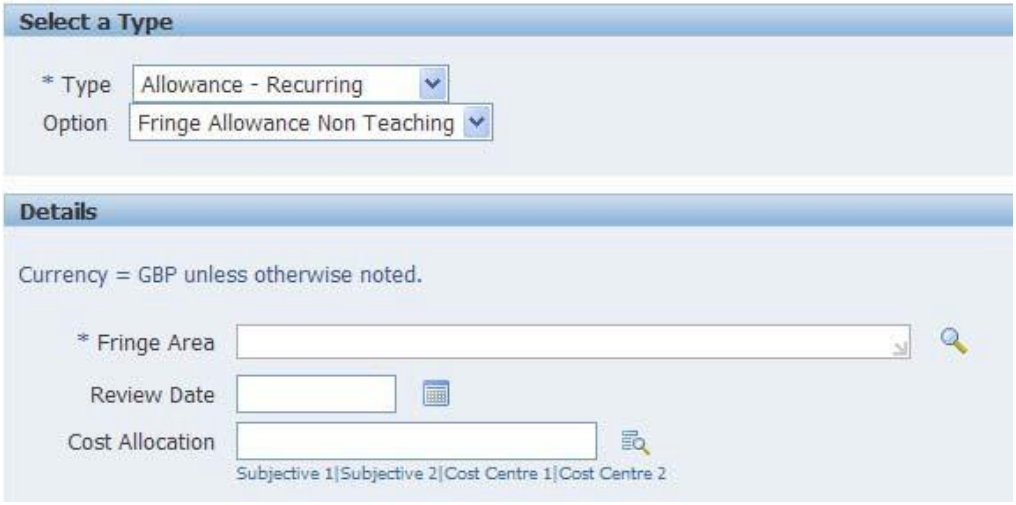
In **Example 1**, the system prompts you to enter the appropriate amount. Carefully take note of whether the system is asking for the full-time equivalent or actual amount to pay and whether that should be the annual or monthly figure.

In **Example 2**, the system prompts you to use the icon in order to pick from a preset list of available items. e.g. Outer or Inner Fringe.

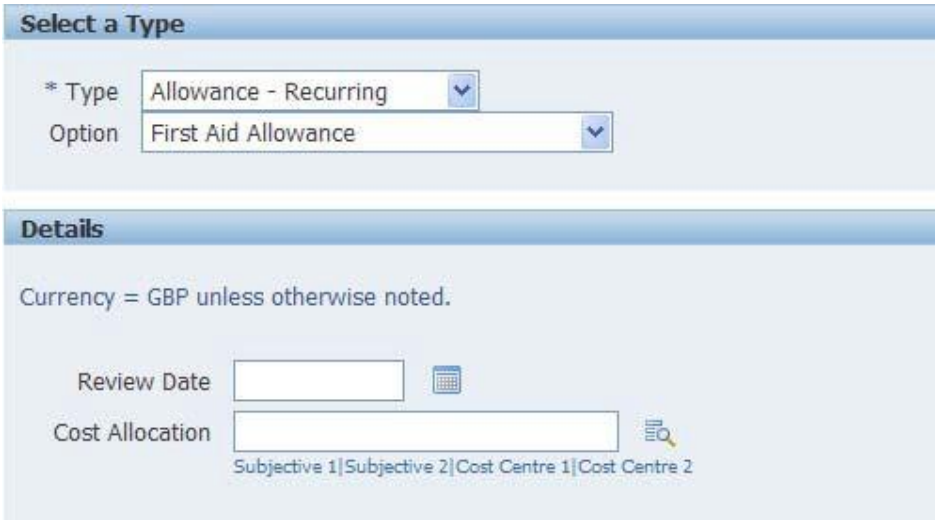
In **Example 3**, the allowance has a fixed pre-set value and you do not need to provide any additional information.

Example 1: An allowance that requires you to specify a value

Example 2: An allowance that requires you to pick from a table of options



Example 3: An allowance with a fixed value that does not require any other data to be added



24. Complete all mandatory fields as indicated with an asterisk *

TIP: Each element can optionally be given a **Review Date**. You can enter a date or pick one from the calendar control. Shortly before the entered date comes around Payroll will provide you with a reminder. Please note that the element will not be automatically ended on that date.

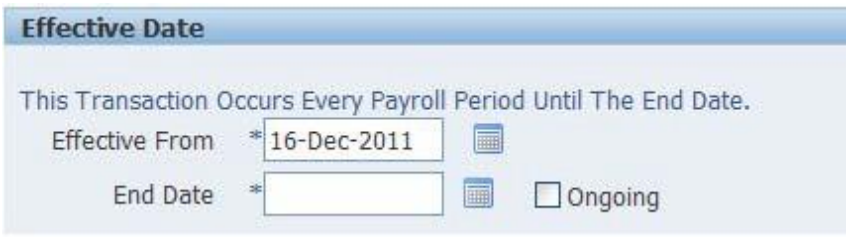
TIP: All allowances are automatically costed to the employee's main cost code. You should only make an entry in the **Cost Allocation** field in those exceptionally rare cases where you need to cost the payment to a different code.

TIP: Where you want to enter a **Cost Allocation** code you need to input the separator | symbol between each segment. e.g. 01|30|RB05|0000 The separator or "pipe" symbol is on the keyboard between the shift key and the Z key.

25. Optionally complete the Review Date and/or Cost Allocation fields as required. (See **TIP**s above).

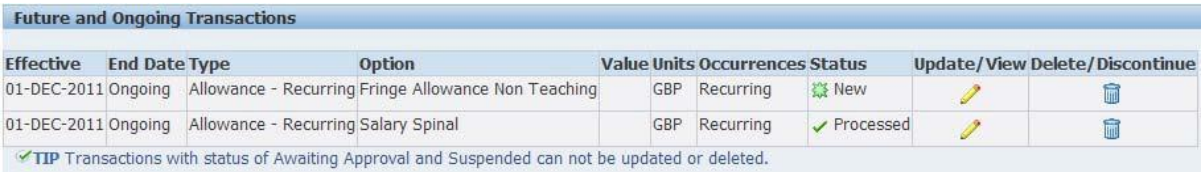
26. Optionally (but unlikely) modify the **Effective From** date as required. It will initially display the employee's start date which would normally be the date required.

27. Optionally, if you know that the element is temporary and will definitely cease on a known future date then you can enter that information now. By default, the ☑ Ongoing checkbox is ticked denoting that it is permanent but by clicking that box the system will provide an **End Date** field where you can specify the date on which the element should cease. **We recommend that you don't use this feature in temporary or fixed term contract cases as you would have to constantly update the element end dates as and when those contracts are extended as they frequently are.**


Effective Date
This Transaction Occurs Every Payroll Period Until The End Date.
Effective From * 16-Dec-2011
End Date *
Ongoing

28. Click Apply

The new item will now be shown on the screen with a status of New



29. Repeat from step 21 for each other element that you wish to add.

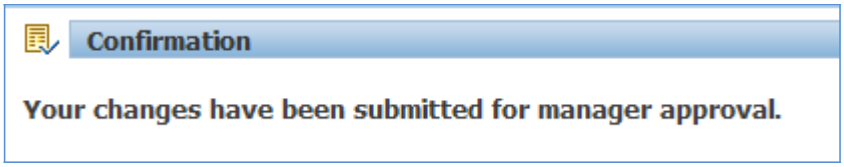
30. Click Next

On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to make any necessary alterations.

31. Optionally click the Printable Page button if you wish to print a copy of the review page or to save copy of it.

32. Click the Submit button.

A message at the top left hand corner of the screen will now display:



33. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created a New Appointment for that employee and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

How to enter an Additional Assignment

The process for adding an Additional Assignment is principally the same as for a New Hire but you work from the Additional Assignment (2 Stage Process) menu instead of the New Hire menu.

After providing the employee's basic details on the following form:

and then click Continue the system asks you to confirm that you have correctly identified the right existing employee.

Add Assignment: People

Name	Employee Number	Assignment Number	Assignment Status	Department Name	Action	Details
Reginald Demo	3020035216	3020035216	Active Assignment	Bardfield Community Primary School		

Return to Search

Click the Action icon to continue.

The remainder of the process is the same as for a New Hire with the exception that you are not asked to enter the employee's basic details, home address etc as these will already be held.

At Step 13 when commencing data entry for Stage 2 items you should of course select Stage 2 from the Additional Assignment (2 Stage Process) menu and not the New Hire version.

Transfers Between 2 Central Payment Schools

Introduction

This facility is only available to Central Payment schools. It should be used where an employee is transferring between 2 schools and avoids one school unnecessarily making their employee a leaver and the new school entering a new hire transaction. Using this process also ensures that absence and other employment history is maintained within the Payroll system and seamlessly transfers PAYE details without the need for issuing and resubmitting P45 statements.

This is a two stage process that utilises the Assignment Change menu process:

- Stage 1: Current School moves the employee into the Transfer organisation (as described in steps 1 to 16 below)
- Stage 2: New School retrieves the employee record from the Transfer organisation and places it into the new school's organisation (as described in steps 17 onwards below)

It is anticipated that administrators at the 2 schools will discuss the arrangements between them before and during this transaction process.

Specific actions required by the employee's old and new employing schools' administrators are:

- **Old (current) School**: if an employee has a future dated change then call or email the Corporate Service Centre requesting advice and assistance before you start the transfer process.
- **New School**: ensure any appropriate allowances are added or removed as appropriate using the **Allowances and Deductions** process.

How to transfer an assignment between schools

1. Select Assignment Change from the main menu.
2. Search for the employee using the standard search technique fully described on page 9

Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

3. From the list of names displayed click the appropriate "Action" icon.

4. In most cases you will be directed straight to step 5, but where the system detects that the employee has some other outstanding transaction awaiting approval then you may now see a display similar to the example shown below. In these cases simply click the Start button.

5. Use one of the calendar controls else type in the required Effective Date.

6. Click Continue

7. Clear the contents of the **Organisation** field and replace with a value of **Transfer**.

8. The employee's Position field will now be blank. Update it to Transfer||Transfer.

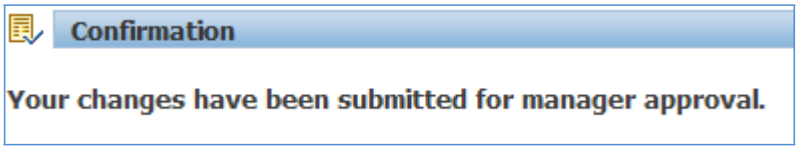
TIP: Steps 7 and 8 are most easily achieved by typing in the letters **TRA** and then letting the system find and offer the items for you to pick from. This technique is fully described in Hints & Tips For New Appointments and Assignment Changes earlier in this guide.

9. Click Next

10. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 7.

11. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

12. Click the Submit button. You will then see the following message:



13. Click Home You will then be returned to the Main Menu and Worklist home page.

14. Select and approve the transaction from your Worklist.

15. Contact the new school and confirm that the assignment record is now available for them to retrieve.

All the remaining steps are the responsibility of the new school.

16. Select Assignment Change from the main menu.

17. Search for the employee using the standard search technique fully described on page 9

    Note: from this point onwards Back or Cancel buttons are available to step back a stage or to cancel the edit altogether.

18. From the list of names displayed click the appropriate "Action" icon. The Organisation for the employee will be **Transfer**

19. Use one of the calendar controls else type in the required Effective Date.

20. Click Continue

21. Clear the contents of the **Organisation** field (it will say **Transfer**) and replace with your school's organisation.

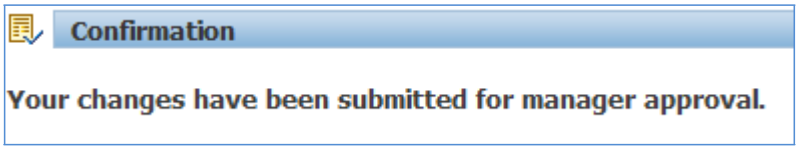
Update the employee's **Position, Grade, Grade Point, Hours** and all other assignment details as required.

22. Click Next

23. On the review page that is now shown check that the entries you have made are correct. If you detect an error select Back to go back to step 21.

24. Click the Printable Page button if you wish to print a copy of the review page or to save a copy of it.

25. Click the Submit button. You will then see the following message:



26. Click Home You will then be returned to the Main Menu and Worklist home page.

Approvals

An item sent by SYSADMIN will now appear in your Worklist confirming that you have successfully created an assignment change transaction and that it has been sent for manager approval.

An item showing your name as the sender will now appear in the Approver's Worklist, asking them to approve your proposal.

If you have joint Administrator and Approver responsibility then both of these entries will be shown in your Worklist.

Refer to the Worklist and Approvals Management section of this document for full details of how the approvals process works.

ePayroll User Management

Introduction

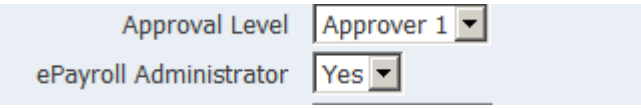
Adding new users and modifying existing user details can normally be managed via ePayroll's Personal Information and Assignment Change menu items.

This of course will wholly rely on your school already having the requisite complement of user responsibilities to make and approve those changes. If you are consequently unable to complete the process described here then you should contact the Corporate Service Centre and ask them to provide you with a copy of payroll's spreadsheet based request form instead.

How to create a new user

Stage 1: Select Employee Personal Information from the main menu and use the techniques described in the Employee Personal Information section of this document to update the employee's email address

Stage 2: Select Assignment Change from the main menu and use the techniques described in the Assignment Change section of the document to update the ePayroll Approver and ePayroll Administrator fields as required.



The morning following the approval of the Assignment Change the new user will receive an automated email confirming that their account has been set up and advise them of their temporary password.

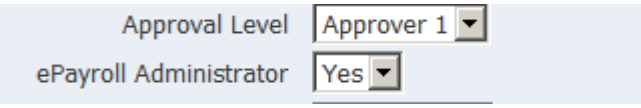
How to modify a user's ePayroll User ID

Select Employee Personal Information from the main menu and use the techniques described in the Employee Personal Information section of this document to update the employee's email address.

The new ID will become effective at the beginning of the following day.

How to change or delete user responsibilities

Select Assignment Change from the main menu and use the techniques described in the Assignment Change section of the document to update the ePayroll Approver and ePayroll Administrator fields as required.



To delete either of the settings simply select the blank item from the pick list.

The morning following the approval of the Assignment Change the new user will receive an automated email confirming that their account has been set up and advise them of their temporary password.

ePayroll

Complete User Guide

Full User Guide for School Administrators & Approvers

Corporate Operations

Version 2.1

July 2015